

MAY 2022

# Real Client Stories

**AAG Wealth Management-**  
**Richard Balaes - Managing Director**



## Partnering for Growth - AAG Wealth Management

AAG was founded in 1995, but it was after a management buyout in 2017 that the organisation's growth plans reached new heights. The team expanded rapidly to 36 employees and with lofty ambitions for success, the steep rise is set to continue.

As AAG grew, the complexities of managing their people increased, the existing processes became inefficient and with greater legal obligations as an employer, their policies required updating. The leadership team recognised they needed specialist HR support to help them build a people plan to accelerate their business goals and to take the potential of the team to the next level.

### HR and People Support

It was Just Global HR's approach to partnering that resulted in their selection as AAG's Outsourced HR provider. A dedicated HR expert was assigned to work with AAG, based on-site when needed, but importantly to be accessible to both the staff and management team. The solid relationships built, and the deep understanding of the organisational culture have created the platform for delivering the HR service needed for success.

The first phase of work involved building the foundations; developing lawful and relevant policies including a staff handbook to ensure the business complies with its legal obligations. They then created new templates and continually review documents including contracts of employment for managing the breadth of people issues.

JGHR then built and implemented an HR system to handle operational processes such as allowing employees to directly update their personal information and book annual leave and sickness absence as well as having their personal documentation to hand 24/7.

Having the HR system has provided data to manage sickness and absence levels as well as ensuring a one true accessible source of information for both AAG and its employees.

With this foundation in place, Just Global HR took ownership of the HR Administration including:

- The onboarding of new joiners; creating offer letters, contracts, management of their references and probationary periods, handling payroll changes with the payroll team;
- Having access to the relevant DBS checking system and SJP Intranet allows the team at Just Global to onboard and offboard staff;
- Management of contract changes as members of staff moving to new roles within the business;
- Management of leavers - conducting exit interviews to help inform the people plans.



Today, Just Global HR provide a fully outsourced HR and consultancy service to AAG and have delivered a number of projects including team recruitment, management of the annual performance appraisal process and coaching the leadership team on how to manage difficult employee issues efficiently and effectively.



### **A Trusted and Pragmatic Partner**

From the initial scope of work the partnership has grown. The HR function runs smoothly, administrative processes are undertaken in a timely manner and both employees and the management team cite the benefits of an approachable, honest third party to help with people issues.

The AAG Group Managing Director Richard Balaes says, “The Just Global HR team have become an extension of our business. They have taken the time to get to know the team, so I trust them implicitly to guide us to do the right thing. They provide exceptional support and pragmatic, forward thinking options that make decision making clearer. I am confident we are working with the right HR partner to help us to achieve our ambitious growth plans”.

### **About AAG**

AAG provides a ‘family office’ view to personal finance, with a complete focus on the client as an individual. This holistic approach to Wealth Management brings together a range of specialists to present the specific advice needed.

They guide clients through the various facets of personal finances including financial plans, investments and mortgages. Wealth Management is at the heart of AAG however additional corporate services include employee benefits, financial education, legal advice, accountancy, tier 1 Visa applications, insurance & foreign exchange.

AAG is a Partner Practice of St. James’s Place Wealth Management.



# **AAG**

WEALTH MANAGEMENT



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