



KAREN ECKSTEIN
LIMITED



Embed and Protect[®]

The professional risk
management service



Have you ever had to deal with a complaint or a claim against your firm?

How much time did you spend on investigating the facts, sorting the problem out, dealing with the lawyers and insurers, managing disaffected staff, appeasing unhappy clients, trying to renew your professional indemnity insurance, and if you can persuade an insurer to renew, doing so at a cost that your business can afford?

That time is time you could and should be spending focusing on moving your business forward or on doing profitable client work.

Embed and Protect® is a professional risk management service. It embeds proactive risk management within your firm by:

- Providing an advice line for all staff whenever they have risk issues on client matters
- Strategically managing the notification and claims process
- Providing bespoke training on relevant risk issues
- Reporting to the board on risk areas and improvements

And so much more....

We take your problem away.

Leaving you free to regain control of your time and your finances. Our fees are transparent. We offer a free general retainer or a fixed monthly fee at your choice so you are not left with an unexpected bill!

Benefits of using Embed and Protect®

The option of proactive risk management at a fixed monthly fee

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Outsources the handling of difficult client issues

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Encourages staff engagement

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Resolves internal issues on risk

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Advice is subject to legal advice privilege

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Improves the firm's risk profile

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Reports on claims and near misses

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Assists in resolution of disputes

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Frees up management time

.....
Saves cost





Common Problems

- A client is being difficult and I don't know why – what should I do?
- I have spotted an error in a client's reported tax affairs – I don't think the client will agree to let me correct it, what do I do?
- A client wants a rebate on the fees, what do I do?
- A client has complained. What should I do?
- I've spotted an error on a client file. The client doesn't know about it yet. What should I do?
- A client has asked for his papers, what should I do?
- I feel uncomfortable about a client matter, what should I do?





What do our clients say?

“We have found the service invaluable in assisting a firm like ours ensure we properly identify, understand, mitigate and respond to the practice risks we face. Our teams feel confident in contacting the service, meaning that issues are not buried, but are dealt with promptly before they become unmanageable.

We have gone through a PII renewal since using the service and believe that Karen’s help and advice has been instrumental in ensuring that we maintain beneficial terms.

Karen’s approach is to be “independent but one of the team” and her involvement has freed senior members of management up to undertake other profitable work- we strongly recommend the service.”

Risk Partner in a large accountancy firm

For more details about Embed and Protect®, our fees and our onboarding process, please contact Karen at hello@kareneckstein.co.uk or on **07973627039**