ACCELERATE

ADVISER SOLUTIONS

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01 - COMMON ISSUES

LACK OF TIME

As a busy adviser, your valuable time is best spent engaging with clients and focusing on growing your business. However, the demands of research, reporting, regulatory requirements and general administration leave many advisers with little time to attend to these vital elements of their business. Lack of time not only impacts your business but also your lifestyle as long hours become a regular routine.

SLOW BUSINESS GROWTH

When time is in short supply, it can become increasingly difficult to develop new clients and even harder to retain them. Business growth suffers, earning power and profitability are negatively impacted and you find that you are simply unable to achieve your future business goals.

UNSUITABLE HIRES

Time-poor advisers may be in desperate need of support to improve efficiency and facilitate growth, but recruiting the right help can be a time-consuming and frustrating process. At worst, rushing this process could lead to unsuitable hires for hard-to-fill roles. At best, any new employee initially consumes valuable time whilst training and embedding into your business.

STAFF COSTS

Employees cost money! Taking basic salary, pension contributions, employer's NI, software licenses, training, computer & IT support, healthcare, life assurance and more into account, you may find that an hourly rate for outsourcing is considerably less expensive by comparison. Outsourcing also eradicates both the time lost in recruiting and the risk of hiring an unsuitable candidate.

POOR PROCESSES

An efficient business should run like a well-oiled machine, but outdated internal systems may be slowing you down. Your business processes should evolve alongside the ever-changing demands of the industry, allowing your company to run as efficiently and smoothly as possible.

02 - OUR PROCESS

WE'LL INTEGRATE SEAMLESSLY INTO YOUR COMPANY, FREEING UP PRECIOUS TIME FOR YOU TO SPEND ON YOUR BUSINESS, YOUR CLIENTS AND YOURSELF.

STEP 1 - DISCOVERY

We will guide you through our unique Accelerated Discovery Process; this enables us to get fully acquainted with your business and ensures seamless integration of our services at the right time. Following an initial call to get to know each other, we'll meet with you to explore your business requirements and future goals in detail, giving us a deeper understanding of how we can help.

STEP 2 - PLANNING

We'll provide you with The Accelerate Route Map, which will outline your concerns along with the opportunities we identified during the Discovery Process. We'll also set out your goals and, most importantly, explain how we can help fast-track you toward achieving those ambitions.

STEP 3 - IMPLEMENTATION

We'll sit down together to define and agree which elements of your business would benefit from our support. We'll introduce you to the team and we'll further clarify our processes; we'll establish what we need from you and what you expect from us. We'll set up your access to our secure information sharing centre and make sure you are confident navigating this. We'll also cover any paperwork needed to formalise our arrangement.

STEP 4 - REVIEW

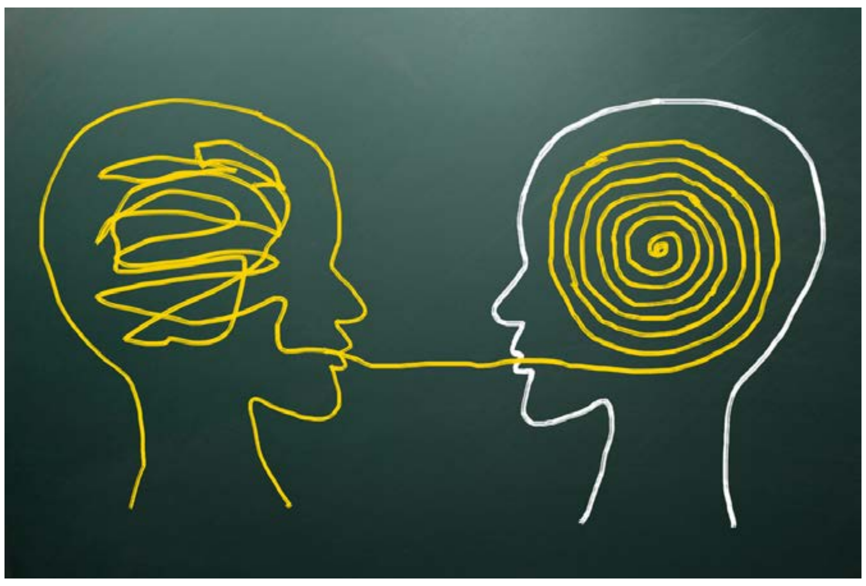
We'll organise a quarterly review meeting with you to ensure your ongoing satisfaction, that you're on track to meet your goals and determine whether there's more we can do to get you there. You'll also have the option to meet with your team on a weekly basis to really keep your finger on the pulse.

03 - DISCOVERY

UNDERSTANDING HOW YOU WORK

We will take you through our unique Accelerated Discovery Process, allowing us to understand your business inside out so we can ensure seamless integration of our services.

Following an initial call to get to know each other, we'll meet with you to explore your business requirements and future goals in detail, giving us a deeper understanding of how we can help.



PROCESS OPTIMISATION

If you're really looking to take your business to the next level, we'll conduct a full process review by guiding you through our unique Accelerated Planning Process.

We'll start by mapping out and assessing the efficiency of your existing methods. We'll evaluate each step of every process and provide guidance on opportunities for improvement.

We'll present our Accelerated Insights document to you, setting out our findings in detail. Next, we'll sit down together and refine our suggestions for improvement, working alongside you to optimise each process whilst ensuring it reflects your culture and remains aligned with your goals.

ROUTE MAP TO YOUR GOALS

Following this, we'll provide you with The Accelerate Route Map, which sets out your goals, details strengths and weaknesses, and outlines any concerns or opportunities identified during the Discovery Process. It also clarifies how we can help you overcome any hurdles and fast-track you towards your ambitions.

We'll then get together to determine The Way Forward; we'll explore The Route Map and how this aligns with your business vision. We'll discuss the kind of help you need from us, how much of it and how often. If you'd like to use our Integrated Service (see page 6 for more details) we'll agree a monthly retainer based on your needs. We'll also introduce our team, and assign the best-suited team member to you.

04 - OUR SERVICES

START-TO-FINISH - OUR INTEGRATED SERVICE

We'll start by sending Letters of Authority and begin collating, organising and analysing all your client's policy information, whilst we await your instructions for building the financial plan. Once your recommendations have been confirmed, you can leave completion of all the compliance, submissions and implementation to our highly skilled team. Our support means your client benefits from a 5-star service and you regain control of your valuable time.

INFORMATION CHASING & ANALYSIS

We'll submit your Letters of Authority and spend our time chasing providers so you don't have to. We'll then present you with a Policy Summary document for each of your client's products.

This is a consistent, uncluttered report containing all key policy information, recent performance data and current risk details in a clear, straightforward format. When you're ready to formulate your recommendations, you'll have all the details you need at your fingertips.

FINANCIAL PLAN CONSTRUCTION

Once you are ready to create your client's plan, simply submit your recommendations via our easy-to-use Adviser Submission document, or just talk the case through with your designated Accelerate team member. Then leave the rest to us; we'll build the financial plan and compile all required supporting documents.

IMPLEMENTATION

When your clients are ready to proceed, just select their approved recommendations on our Implementation document and our team will process all applications and submissions on your behalf.

OUR AD-HOC SERVICE

We understand that not all advisers will need start-to-finish solutions and may just need help on a case-by-case basis. That's no problem! We'll fit in with your requirements; whether you just need help to get a plan written or require some assistance with implementation, you can submit your request at any point in the client journey and we'll be happy to help.

ANNUAL REVIEWS

Annual reviews are a great way to maintain contact and boost your relationship with your clients.

Together we'll determine which of your clients you'll be reviewing each month and deliver their annual review letters to you ahead of time for presentation.

05 - POLICY SUMMARY

INFORMATION CHASING & ANALYSIS

Below is an example of our Policy Summary document. Naturally, we will supply all original provider information to you; however, our condensed summary sheet will provide you with concise information along with a portfolio performance chart and Defaqto risk rating. High level information needed to make a recommendation (such as any guarantees, bonuses, or enhanced tax-free cash) will also be outlined in this easy-to-read, client-friendly summary. As well as our policy summary we'll also provide you with a full overview of your client's portfolio.

Policy Summary

Provider:	Product:	Value:	Risk Rating:
SCOTTISH WIDOWS	PP	£275,000	7

Policyholder: Mrs Smith
Provider: Scottish Widows
Type: Personal Pension
Policy Number: 18051645
Status: Active

Value: £275,000 **As at** 26/05/2022
Transfer Value: £275,000 **As at** 26/05/2022
Value difference: N/A
Start Date: 01/01/2001
NRA: 65

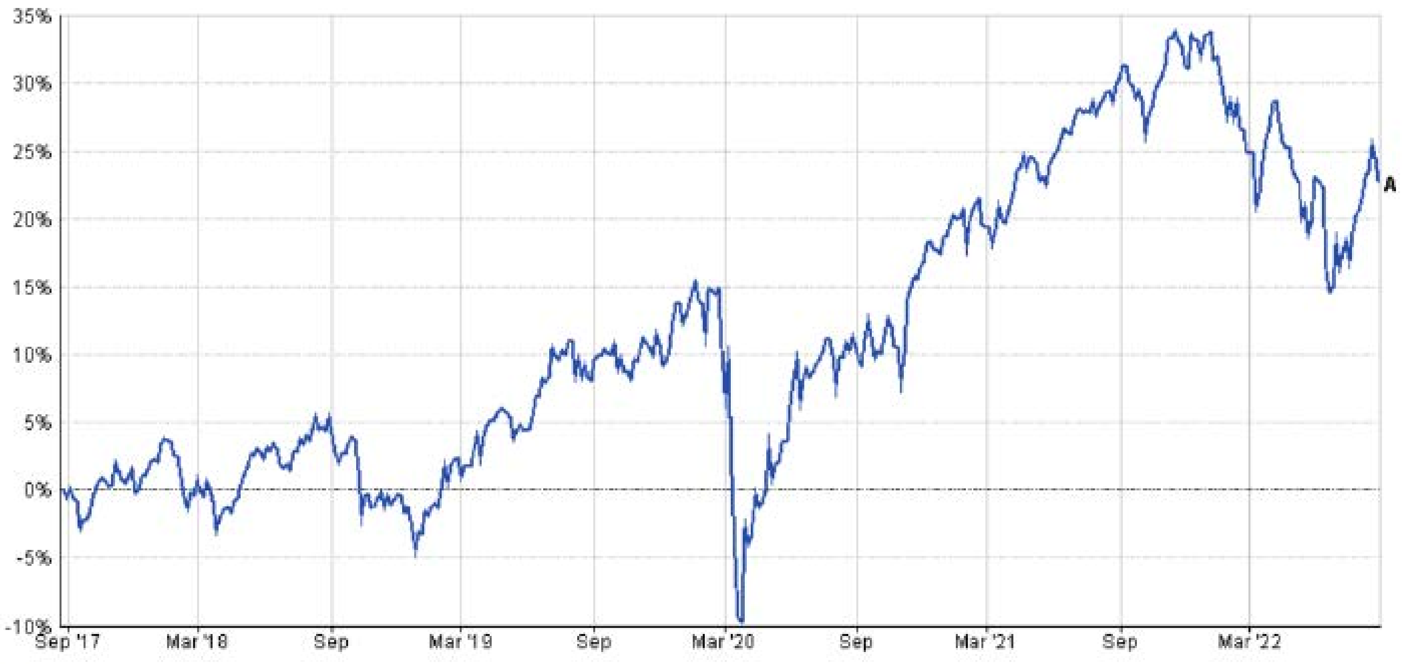
Current Investment Funds:	SEDOL	Allocation (%)
Scottish Widows Pension Portfolio 3	B58KT87	72.73%
Scottish Widows Pension Portfolio 4	B597YZ9	18.18%
Scottish Widows Pension Portfolio 5	BQJZTB1	9.09%
TOTAL		**100.00%**

Fees:

Fund Charge	0.10%
Platform Charge	0.10%
Other Fees	0.11%
Total	0.31%

Contributions:
Employee: £100 (G) £125 (N)
Employer: £200
Per: Month
Index: N/A

Performance



A - Mrs Smith - Scottish Widows Portfolio TR in GB [22.73%]

25/08/2017 - 25/08/2022 Data from FE fundinfo2022

06 - PORTFOLIO VALUATION

INFORMATION CHASING & ANALYSIS

To complement our individual Policy Summary documents we'll also provide you with our one-page Portfolio Valuation. This is a client-friendly, easy-to-read outline of all the separate components of your client's existing portfolio.

This will make giving advice as streamlined and efficient as possible for you, while making the process more transparent and accessible for your client.

Portfolio Valution - Mr & Mrs Smith

Provider	Type	Policy Number	Owner	Defaqto - Risk Level	Value	As at
Royal London	Cash ISA	RL02639	Mr Smith	0	£100,000	27/04/2022
Quilter	SS ISA	QUI6389230	Mrs Smith	6	£65,920	27/04/2022
ReAssure	GIA	RA02988	Joint	8	£111,764	28/04/2022
			TOTAL INVESTMENTS		**£277,684**	

Provider	Type	Policy Number	Owner	Defaqto - Risk Level	Value	As at
Scottish Widows	Personal	SW68230	Mr Smith	4	£457,935	27/04/2022
Aviva	GPP	TK8162-01	Mrs Smith	5	£76,920	27/04/2022
			TOTAL PENSIONS		**£534,855**	
			TOTAL PORTFOLIO		**£812,539**	

07 - PLAN CONSTRUCTION

PLAN CONSTRUCTION

We think an adviser should be free to devote most of their time to developing, onboarding and advising clients, leading to greater profitability and overall business growth.

However, the essential task of writing financial plans is one of the most time-consuming. Advisers have acknowledged that if they could be relieved of just one part of the process, it would be writing the financial plan itself.

We pride ourselves on our ability to analyse, research and construct sound financial plans, using your preferred layout or our own templates. Let us take this task off your hands.

YOUR TEMPLATES

We recognise that many advisers will have a house style and a preferred layout for their financial plans – they understand them and their clients are familiar with the format. In our Discovery Process we will ensure we are fully conversant with your preferred templates so that we present your reports in your style.

OUR TEMPLATES

We have also created our own excellent plan templates to suit any recommendations you may wish to make.

All our templates are clear, compliant and easy to read, providing you with a great-looking financial plan personalised to your client.

BESPOKE TEMPLATES

If you prefer, we'll create a bespoke plan style for you, using your original format as a foundation to ensure your character shines through.

We'll work with you to add our spin to your template, offering you a bespoke plan that makes the perfect impression.

GET IN TOUCH TO BOOK YOUR FREE 'DISCOVERY' AND RECLAIM YOUR TIME.

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OUR INVOLVEMENT WITH ONETREEPLANTED

We understand the value of giving your clients a beautifully bound, hard copy of their financial plan but that doesn't mean it should cost the earth. For every financial plan we complete, big or small, we pledge to plant one tree.

You can find out more at onetreeplanted.org