

# ACCELERATE

ADVISER SOLUTIONS



# ABOUT US

Accelerate Adviser Solutions provides outsourced admin, paraplanning and business support to busy financial advice firms across the UK. We work as a seamless extension of your team, helping you reduce back-office pressure, improve efficiency, and deliver a better client experience.

With a deep understanding of the financial planning profession, we tailor our support to fit your firm’s unique needs – whether you're looking for day-to-day operational help or strategic input to drive long-term growth. Our goal is simple: to give you more time to focus on your clients, your business and yourself.



# WHAT WE DO...

**Administration  
Support**



**Paraplanning  
Support**



**Business  
Support**



# ADMIN SUPPORT



- ✓ LETTERS OF AUTHORITY
- ✓ INFORMATION GATHERING
- ✓ ONGOING POLICY SERVICING
- ✓ CHASING PROVIDERS AND THIRD PARTIES
- ✓ ANNUAL REVIEWS
- ✓ DATA INPUT
- ✓ CRM UPDATES AND MAINTENANCE
- ✓ DOCUMENT PREPARATION AND MANAGEMENT

## Reliable. Efficient. Scalable.

At Accelerate Adviser Solutions, our administration services are designed to take the pressure off your business and ensure everything runs smoothly behind the scenes. Our experienced admin team works as an extension of yours, managing the day-to-day tasks that keep your firm compliant, efficient and client-focused.

## Flexible support that fits your business

Whether you need ongoing admin support or help during peak periods, we offer a flexible and reliable service tailored to your needs. Our goal is to free up your in-house resources, reduce bottlenecks, and give you the space to focus on what you do best — advising clients and growing your business.

# PARAPLANNING SUPPORT



SUITABILITY REPORT WRITING



CLIENT STRATEGY  
SUPPORT



POLICY AND PLATFORM  
ANALYSIS



CASHFLOW MODELLING  
AND ANALYSIS



TECHNICAL SUPPORT AND  
GUIDANCE



RESEARCH AND PRODUCT  
COMPARISONS

## Technical expertise. Tailored to your process.

Our paraplanning services are designed to seamlessly integrate with your advice process, delivering high-quality, compliant reports and technical support — without the delays or overheads of managing it in-house. Whether you're a solo adviser or part of a larger firm, we become a trusted extension of your team.

## Consistent quality. Flexible delivery.

At Accelerate Adviser Solutions, we know that every firm works differently — that's why our paraplanning support is flexible, scalable and built around your advice style and compliance requirements. Whether you need ad hoc support or a fully outsourced solution, we help you deliver robust, well-documented advice with speed and confidence.

# BUSINESS SUPPORT



END-TO-END PROCESS  
REVIEWS



WORKFLOW MAPPING  
AND OPTIMISATION



CRM STRUCTURE AND  
USAGE IMPROVEMENTS



TEMPLATE & DOCUMENT  
STANDARDISATION



PROJECT MANAGEMENT



STRATEGIC PLANNING  
AND IMPLEMENTATION  
SUPPORT

## **Strategic insight. Smarter systems. Stronger growth.**

Our Business Support service is designed to help you run a more efficient, client-focused and scalable advice firm. By taking a fresh look at your operations, we identify where improvements can be made – then work with you to streamline your processes, enhance your client journey, and implement best practice across your business.

## **Tailored consultancy that transforms the way you work**

No two firms operate the same way – which is why our consultancy is never one-size-fits-all. We collaborate closely with you to understand how you work today and where you want to be. Whether you're preparing for growth, onboarding new team members, or simply want to free up more time, our business support ensures your back-office is built to support your goals.

# EXPERTISE

## PROVIDER PLATFORMS

Our team is experienced with all major provider platforms, including Quilter, Aviva, L&G, Royal London, Aegon, and more. From new business to ongoing servicing, we handle each system efficiently, ensuring smooth, accurate and timely support across your client base.



## INDUSTRY TOOLS

We work confidently with tools like FE Analytics, Voyant, CashCalc, iPipeline, and others — ensuring accurate analysis, modelling, and reporting that align with your advice process. Our familiarity with these systems means faster turnaround and seamless integration with your existing workflows.



# QUILTER ACCREDITED

As a Quilter-accredited support provider, we're trusted to manage cases from initial submission right through to Business Assurance sign-off. Our in-depth knowledge of Quilter's processes and standards ensures your cases are packaged correctly, progress smoothly, and meet all compliance requirements – saving you time, reducing rework, and speeding up completion.



## CASE RESEARCH



## COMPLETE SUITABILITY



## SUBMIT CASE



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

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WEBSITE | WWW.ACCELERATETEAM.CO.UK



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](https://onetreeplanted.org).