



SANDRINGHAM
POWERED ADVICE

PARAPLANNING SUPPORT

Our mission: improving the efficiency of your business processes

Many factors work together in delivering great customer outcomes. We believe that the single most important factor is advice.

Successfully delivering advice demands a professional relationship of trust, where you can dedicate sufficient time and expertise to implementing and gradually refining your clients' financial position. However, the information, skills and tools required to deliver a first-class proposition to clients have become complex and time-consuming. How much of your working time is actually dedicated to providing more, and better, advice to your clients?

Our solution: Sandringham Powered Advice (SPA)

Sandringham Powered Advice is a paraplanning service that works in harmony with your business needs.

Book only the paraplanning time you need, when you need it, using our online booking system. Once confirmed, an SPA team member will contact you to discuss the work you would like us to do, obtain any additional information required and agree the objectives for your booking.

Each slot comprises of 2.5 hours' paraplanning time to assist you in driving your business forwards. We complete all research and recommendations in line with Sandringham's business standards and upload documents to Enable upon completion.

Using SPA - Example 1 - Pension review & switch

- Agree objectives and parameters
- Fund research and comparison
- Pension charges comparison tool
- Pre-approval agreement
- Completion summary

Service Where When Details

November 2019

TODAY FIRST SLOT

◀◀ < > ▶▶

🔍 Sandringham Powered Advice

👤 No Preference

📍 Online / Phone

Times are displayed in GMT (+00:00) Europe/London

Monday 25	Tuesday 26	Wednesday 27	Thursday 28	Friday 29	Saturday 30	Sunday 1
14:00 16:30	10:00 12:30 14:00 16:30	10:00 12:30 14:00 16:30	No available slots	10:00 12:30 14:00 16:30	No available slots	No available slots

Using SPA - Example 2 - Simple investment review & replacement

- Agree objectives and parameters
- Fund research and comparison
- Cost tool and suitability
- Provide documentation to implement
- Suitability report

FAQ:

How much will the service cost?

We charge £138 for a single slot; however, should you have particular requirements please contact the Paraplanning department for a bespoke quote.

What if SPA don't complete the full case in the time allocated?

We will always provide you with an indication of what can be achieved in the time slot you book. If you do want us to complete a full case for a more complex client, we will also advise you on how many slots you might require. We can arrange to book additional slots for you when we discuss the case. It is always advised to make contact with the Paraplanning department before booking slots to discuss your case.

What if you don't use all the time I booked?

We will work closely with you to ensure you don't over-book the slots you need. If you do have spare time, we will grant you another slot in the future, at a time you can confirm later. We do not issue refunds for slots that you book but don't use.

Can I have the same Paraplanner each time?

We will allocate Paraplanners based on the specialisms and skills. It may be that you won't be allocated the same Paraplanner each time. Should you feel that a more permanent paraplanning relationship would benefit you, you may wish to consider our Sandringham Advisers' Service (SAS). Please see our SAS brochure for more details.

What if my SPA Paraplanner is unavailable (due to sickness, for example)?

We will inform you at the earliest opportunity. In most cases we will be able to allocate the work to another Paraplanner.

Are there any limits on usage?

No, but there are a limited number of slots available each week in line with the availability of team members.

How do I pay for the service?

Payment can be made online when you book.



Additional Benefits:



No pre-approval requirements (your SPA time will include this).



We support your advice with the best tools from Selecta-Pension, CI-Expert, FE Analytics and more.



Cash-flow modelling to support and demonstrate needs and advice solutions.

Access additional information and make bookings using the Sandringham Support Website (Zendesk).

<http://support.sandringham.co.uk>

SANDRINGHAM

FINANCIAL PARTNERS
Your Financial Partner for Life



Sandringham Financial Partners Limited
5th Floor, 30 Market Street
Huddersfield
HDI 2HG

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