SANDRINGHAM IN SUMMARY

- ✓ **National Directly Authorised IFA:** Formed with Appointed Representatives, Registered Individuals with Trading Styles and Registered Individuals of Sandringham.
- ✓ **Commercial Independence:** With no objective to amass assets or clients, no in-house solutions or vertical integration.
- ✓ **Efficient Digital Processing:** Enable back-office system built by advisers for advisers with open market integrations.
- ✓ **Integrated Research tool and Cashflow Modelling:** With open market platform feeds.
- ✓ **Precision Client Experience:** Our unique market-leading MiFID II PROD compliant client review process. Eliminating adviser prep admin time, containing restatement of suitability of advice and review output suitability letters.
- ✓ **Market Research & Due Diligence:** Impartial view on the market with the provision of one of the largest researched and approved Investment offerings with access to WOM Investment, Mortgage, Protection, and platform choice.
- ✓ **Client Wealth Portal:** Digital access for clients to view their full financial position and to interact with you in a secure environment.
- ✓ **Sandringham Time:** Support, systems and processes that maximise the engagement between an adviser and their client.
- ✓ **Paraplanning Services:** Including end-to-end admin project management services and identification of business growth opportunities.
- ✓ **Market & Campaign Support**: Professionally packaged client marketing and social media engagement.
- ✓ **SFP Advice Guarantee:** Full PII cover with guaranteed no excess liability, now or in the future.
- ✓ **Partnership Culture:** Designed to support you and your business to provide great client outcomes whilst running a proficient, profitable, and future proofed business.

Retentions and Fees:

Basic retention: £671 per month

Variable retention: 9.5% of turnover

FSCS levy: £242 per month

Precision Pack cost, per pack per household

Full pack ave £58 (£42 + £16 per additional contract)

E pack ave £48 (£32 + £16 per additional contract)

Streamline pack £34 (£30 + £4 per additional contract)

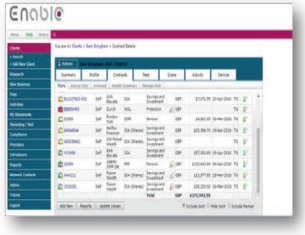
Wealth Platform

The unique Wealth Platform experience for Sandringham clients.

Client Newsletters

Sandringham's centralised marketing service.

Enable

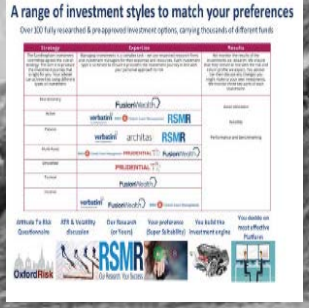


Sandringham's adviser designed back office system, Enable.

Precision Annual Review Pack

The market leading Annual Review Service.

Investment Proposition



Sandringham Website

The opportunity to have your own personalised website.