

# 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.

## 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

A range of investment styles to match your preferences  
Over 200 fully researched & pre-approved investment options, carrying proceeds of different funds

Strategy	Options	Assets
<p><b>Income</b></p> <p>Income generating investments, including UK and international equities, bonds, and property.</p>	<p><b>Prudent (Risk 1-2)</b></p> <p>Investments with a low to medium level of risk, including UK and international equities, bonds, and property.</p>	<p><b>Global</b></p> <p>Investments with a high level of risk, including UK and international equities, bonds, and property.</p>
<p><b>Capital Growth</b></p> <p>Investments with a medium to high level of risk, including UK and international equities, bonds, and property.</p>	<p><b>Aggressive (Risk 3-4)</b></p> <p>Investments with a high level of risk, including UK and international equities, bonds, and property.</p>	<p><b>High Growth</b></p> <p>Investments with a very high level of risk, including UK and international equities, bonds, and property.</p>

## Sandringham Website



The opportunity to have your own personalised website.

## Retentions and Fees:

Basic retention: £724 per month  
Variable retention: 9.5% of turnover  
FSCS levy: £256 per month

Precision Pack cost, per pack per household:

*Precision Plus pack ave \* £79 (£63\*\* + £16 per additional contract)*

*E pack ave £64 (£48 + £16 per additional contract)*

*Precision pack £40 (£36 + £4 per additional contract)*

*\*is the cost of a pack with two plans \*\*is the cost of a pack with one plan*