Sandringham
Financial Partners

Powered by Sandringham... helping YOU build a PROFICIENT & PROFITABLE CLIENT proposition

ENABLE
DASHBOARD

Sandringham Partners use our Enable back office technology for every aspect of their business activity. Whether it be reading the latest bulletins, recording individual cases or forecasting their business income, Enable is central to the process and has been designed by advisers for advisers. The central goal of our information technology is to remove manual inefficiencies from your business. Enable provides all advisers with a simple and speedy process to record their advice, and monitor their clients assets. Your dashboard controls and reports all aspects of a modern advisers' business and presents it to you in real time.

What is more, Enable links seamlessly with our core platform from Fusion Wealth. No need for re-keying cases from platform, to back office. Client information and policy details flow between our key systems with immediacy and accuracy.

Enable

Everything you see in the Enable dashboard is in real time so you will never have any doubt about what is there, and what is not.

Activities

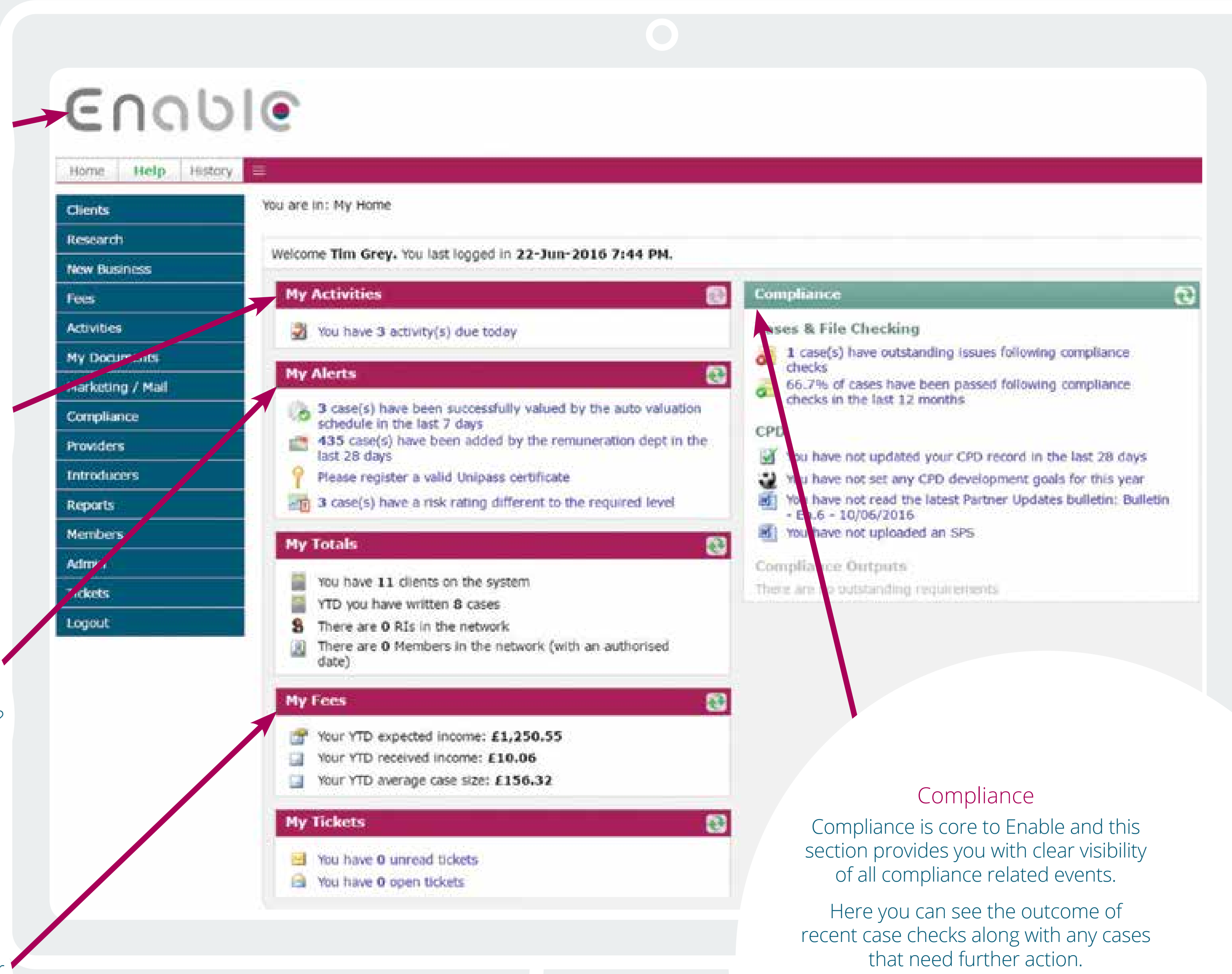
These are 'jobs' to complete. They can be set by head office or by yourself. For example, things like annual reviews trigger a series of activities like book a meeting, do a review or a follow up is required.

Alerts

This covers any system based issues – have you any clients who's valuation has failed? Have you any clients with investments that are outside their risk tolerance?

Fees

A quick glance of this gives a Partner their fee income, and their expected fee income for the year to come. Clicking through gives a full case by case breakdown to the penny.



Compliance

Compliance is core to Enable and this section provides you with clear visibility of all compliance related events.

Here you can see the outcome of recent case checks along with any cases that need further action.

You'll also get handy reminders to review bulletins or help guides you may have missed. Clicking through and reading the documents counts as relevant time towards you annual CPD requirements.

SANDRINGHAM
FINANCIAL PARTNERS

If you've read through everything in this booklet, on our website, or perhaps you've met with a member of our team, and know Sandringham is the right choice for you, your clients and your career why wait any longer?

Simply download and complete the application form and the Statement of Honesty, Integrity and Reputation form at **http://www.yourfinancialpartnerforlife.co.uk/talk-to-us/join-us/** and return them to the following address:

Sandringham Head Office
5th Floor
30 Market Street
Huddersfield
HD1 2HG

It really is that simple to start reaping the benefits of being a Sandringham Founding Partner.

If you have any queries about the forms above, or any part of this website, please contact us on:

08000 88 44 32