

Sandringham Powered Admin

Partners can 'book' a session (slot of time) where we work on their cases. There are no limits to what that might entail. For example, in the time allotted we could:

- Prepare your suitability report and tidy your enable file.
- Provide a Selectapension and pre-approval, as well as produce the provider application documents/KFDs etc.
- Provide a TOMAS report and/or retirement income (cash flow) model.
- Produce letters of authority and covering letters to your clients.
- Request ceding scheme information and commence research.
- Complete fact-finds (with the Partner over the telephone, or based on your meeting notes) and identify action points.
- Organise your annual review calendar.
- Produce protection quotes, documentation and suitability reports.

The goal of any Sandringham Powered Admin ('SPA') session/slot is to move your client towards a better outcome, and your case toward completion. You set the task.

We offer time slots for a fixed amount of time and a fixed price. Once you have a slot, you know when the work will be performed. If we cannot totally complete your case, we will provide instructions on what still needs to be done, and of course you could book another slot to have this work done for you.

You can dip in and out as you need to. You are not under obligation for more than the single slot itself. All we ask is that you are available (on the telephone) during the slot. Additionally, for cases that would routinely be a pre-approval, we expect to provide this within your slot time – we don't expect you to come back and forth between the SPA service, pre-approvals and file review.

Each session comprises 3 hours, and 30 minutes preparation/activity recording time.

Sandringham Powered Admin Price: £115 + VAT per session

Sandringham Adviser Services

A **total support package** for your business.

SAS provides you with our own personal, skilled and dedicated assistant, without the commitment and implications of taking on an employee. The currency of greater success is giving advisers more time. Our Adviser Services gives you this in one package.

A named individual specialist Partner Support Adviser Paraplanner/Administrator based at head office, who will:

- Communicate with you regularly about forthcoming workloads.
- Obtain information on client policies/ceding schemes for you.
- Complete and update fact-finds enable records and systems as you work on clients and cases together.
- Complete and oversee all research work and produce documents for you to deliver and implement the advice process
- Obtain your signed proposal forms and submit, monitor and manage new business cases.
- Complete all pre-approval work, suitability reports or other client correspondence as required.
- Create activity records for all work completed (demonstrating the time cost of the work you do for clients).
- Create and update Lifetime Cash-Flow modeling for your clients.

This service will be a fixed monthly charge. As your personal Partner Support Advisor will oversee every aspect of your new business and administration, we will also offer the following additional benefits:

- All TOMAS reports included at no additional charge.
- All Selectapension work included at no additional charge.
- A full user licence of CashCalc lifetime cashflow software.
- Stationery box & Marketing Pack.

The cost of this service will be invoiced monthly in arrears.

Sandringham Adviser Services Admin Price: £1,500 pm no VAT