

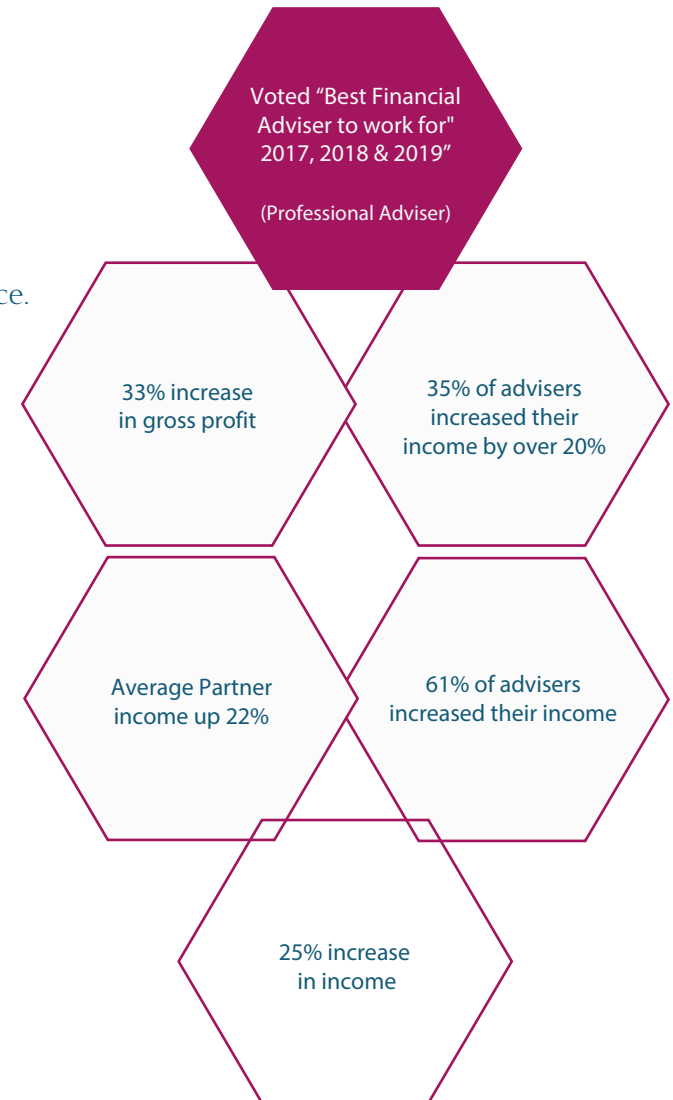
# SANDRINGHAM IN SUMMARY...

## We provide the following benefits (amongst others):

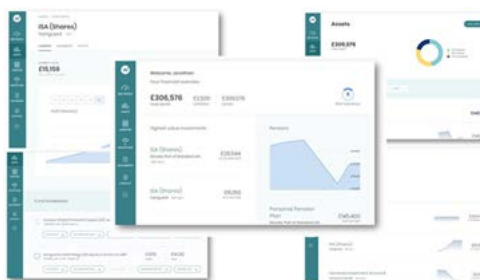
- We offer independent financial advice and we are proud to be commercially independent (no vertical integration).
- Sandringham Powered Advice (SPA), our in-house paraplanning and administration service.
- Professionally packaged client marketing.
- Wealth Platform Client Portal - your clients financial information analysed and gathered in one place.
- Our adviser designed back office system, Enable.
- Experienced head office Partner support team.
- An 'independent and impartial' view on the market – over 280 agencies and data feeds across the market, meaning there is no requirement to move client monies.
- Our Advice guarantee & full PII cover (no excess liability, now or in the future).
- Sandringham provides 100+ fully researched and approved investment options for your convenience, and access to WOM investment and platform choice.
- Free of charge business growth/planning support.
- Learning Academy.
- Recognition that ownership of clients stays with our Partners.
- Multiple ways to join us as an RI, AR or Trading Style.
- Your own personalised website.
- Significant client transfer/transition support.
- Quarterly Partner events and regular informal 'best practice' meetings.
- A true Partnership culture designed to support you and your business to provide great client outcomes in an environment where we do not take a penny from investment partners or platform technology providers.
- A unique and market leading client review process, which eliminates adviser admin time and maximises the engagement between an adviser and a client.

## Our Partner commercials are as follows:

- £671 per month basic retention (no charge for the first 6 weeks).
- 9.5% variable retention of turnover.
- £202 FSCS levy per month.
- Average Precision review pack production cost, on average £60 per household, per annum (base cost £26 + £16 per post RDR fee paying policy).



## Wealth Platform



The unique Wealth Platform experience for Sandringham clients.

## Precision Annual Review Pack



The market leading Annual Review Service.

## Client Newsletters



Sandringham's centralised marketing service.

## Sandringham Website



The opportunity to have your own personalised website.

## Enable

The screenshot shows the Enable back office system. It features a table with columns for 'Clients', 'Summary', 'Profile', 'Contracts', 'Fees', 'Status', 'Activity', and 'Service'. The table lists various clients and their associated financial data. The interface is clean and professional, with a color scheme of blues, greys, and whites.

Sandringham's adviser designed back office system, Enable.

## Investment Proposition

### A range of investment styles to match your preferences

Over 100 fully researched & pre-approved investment options, carrying thousands of different funds

Strategy	Expertise	Results
<p>The Sandringham investment journey across the world of investing. The aim is to provide the client with a clear understanding of the investment journey in line with their personal approach to risk.</p> <p>Discourtesy</p> <p>Active</p> <p>Passive</p> <p>Multi-Asset</p> <p>Smoothed</p> <p>Tactical</p> <p>Income</p>	<p>Managing investments in a complex world – we can represent research firms and investment managers for their expertise and resources. Each investment type is screened to ensure it provides the investment journey in line with your personal approach to risk.</p> <p>FusionWealth</p> <p>verbatini</p> <p>architas</p> <p>RSMR</p> <p>PRUDENTIAL</p> <p>FusionWealth</p> <p>verbatini</p> <p>FusionWealth</p> <p>RSMR</p>	<p>We research the results of the investments and research, the results that show the client the risk and the return of the investment. This allows the client to make an informed decision on the investment. The results are then used to provide the client with a clear understanding of the investment journey in line with their personal approach to risk.</p> <p>Asset Allocation</p> <p>Volatility</p> <p>Performance and benchmarking</p>

