

SANDRINGHAM IN SUMMARY

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.

- ✓ **National Directly Authorised IFA:** Composed of Registered Individuals, Registered Individuals with their own trading styles and Appointed Representatives of Sandringham.
- ✓ **Commercial Independence:** With no objective to amass assets or clients into in-house solutions.
- ✓ **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 and PROD compliant client review process.
- ✓ **Market Research & Due Diligence:** Impartial view on the market with the provision of one of the largest researched and approved investment offerings. 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: £724 per month

Variable retention: 9.5% of turnover

FSCS levy: £242 per month

Precision Pack cost, per pack per household

Full pack base cost £58 (£42 + £16 per contract)

Online pack base cost £48 (£32 + £16 per contract)

Streamline pack base cost £34 (£30 + £4 per contract)

Precision Annual Review Pack



The market leading Annual Review Service.

Investment Proposition

A range of investment styles to match your preferences
Over 20 Fully researched & pre-approved investment options, carrying thousands of different funds

Strategy	Options	Features
Income	Parabank (UK) Ltd	Income
Equity	Parabank (UK) Ltd, RSMR	Income and capital growth
Multi-asset	Parabank (UK) Ltd, RSMR	Income and capital growth
Global	Parabank (UK) Ltd, RSMR	Income and capital growth
Property	Parabank (UK) Ltd, RSMR	Income and capital growth
Alternative	Parabank (UK) Ltd, RSMR	Income and capital growth

Sandringham Website



The opportunity to have your own personalised website.