SANDRINGHAM IN SUMMARY

Wealth Platform



The unique Wealth Platform experience for Sandringham clients.

Client Newsletters



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)

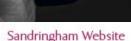


The market leading Annual Review Service.



A range of investment styles to match your preferences





Sandringham Website





personalised website.