

SANDRINGHAM IN SUMMARY

- ✓ **National Directly Authorised IFA:** Formed with Appointed Representatives, Registered Individuals with Trading Styles and Registered Individuals of Sandringham.
- ✓ **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 PROD compliant client review process. Eliminating adviser prep admin time, containing restatement of suitability of advice and review output suitability letters.
- ✓ **Market Research & Due Diligence:** Impartial view on the market with the provision of one of the largest researched and approved Investment offerings with 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.
- ✓ **Comprehensive PII cover provided**
- ✓ **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:	£836 per month
Variable retention:	9.5% of turnover
FSCS levy:	£103.81 per month

Precision Pack cost, per pack per household:

<i>Precision Plus pack ave*</i> :	<i>£88 (£70** + £18 per additional contract)</i>
<i>E pack ave:</i>	<i>£71 (£53 + £18 per additional contract)</i>
<i>Precision pack:</i>	<i>£45 (£40 + £5 per additional contract)</i>

**is the cost of a pack with two plans **is the cost of a pack with one plan*

