# Sandringham paraplanning

For UK advisers only,
not for use with clients

Smarter solutions for busy advisers

Sandringham
FINANCIAL PARTNERS

www.sandringham.co.uk

# Contents



# Unlock your full **potential**

As a financial adviser, your time is valuable. You excel at building relationships, crafting bespoke financial strategies, and guiding clients towards their goals. But behind every great recommendation you make, often lies a mountain of compliance, research, and report writing. This administrative burden can eat up valuable time – leaving less opportunity for you to focus on what truly matters.

That's where we come in. Our expert paraplanners support advisers like you by handling technical and labour-intensive tasks, empowering you to concentrate on growing your business and delivering great client outcomes. Whether you need full, comprehensive support, help with single elements of cases like research or cashflows, or simply an extra pair of hands at peak times, we're here to help.

# **Support** you can rely on

Paraplanning is arguably the backbone of efficient financial advice. It's the behind-the-scenes work that helps bring financial plans to fruition. Let's face it, it's unlikely that you became an adviser only to become bogged down by paperwork, or stuck on the phone for countless hours with providers. Let us take care of that.

Here are some common areas we can help with:

- **Inheritance planning**
  An increasingly complex area, which our team can help you navigate. This might involve the creation of bespoke suitability reports or discussion documents to aide client conversations.
- **Administration**
  Our team are well-versed in carrying out a wide range of admin tasks. From speaking with providers, to inputting contracts on Enable, we're able to get the job done efficiently.
- **Quality research**
  We utilise a comprehensive range of tools, such as SelectaPension, FE Analytics, Assureweb, CashCalc, MICAP, and more. You'll enjoy the benefits of their capabilities without having to incur license fees.
- **Cash-flow modelling**
  In-depth analysis catered towards clients' needs, products, and funds. This can be accessed under your own CashCalc licence to support your ongoing client servicing.

These areas are just the tip of the iceberg when it comes to our offering. We provide a broad range of services to help across all facets of advice delivery; supporting you with greater efficiency to expand your client base and bolster revenue.

Whether you need help with technical 'at retirement' or Inheritance Tax cases, or support with the nuts and bolts of admin, we're here for you.

# Our **promise** to you

Many advisers have cited long hours and the constant need to juggle various tasks as a source of stress and anxiety. Knowing you've got support to fall back could improve your wellbeing and personal fulfilment.

## Our paraplanners are:

**Experts** in Sandringham's core investment solutions, their application, as well as the different Sandringham business standards and processes

**Risk-aware**, and focused on putting your best interests, and those of your clients', first

**Great communicators**, and eager to collaborate with you to find the best solution

**Confident** in their understanding of different providers and platforms in the market

Importantly, we aim to ensure case submissions pass first time at file check stage. This helps to maintain a high level of KPI records for your SM&CR Certification and reduces further time spent dealing with resubmissions.

# How it **works**

### 1. Tell us what you need

A chat to ensure we're on the same page, giving us a firm understanding of the requirements and details of the case(s) you'd like support with. This also helps us to match you with the most suitable paraplanner from our expert team, who can collaborate with you further if needed.

### 2. Send us the relevant information

You share client fact finds, supporting documents, and other useful paperwork which relate to the case(s). We'll be in touch if we have any questions.

### 3. We get to work

Rest easy in the knowledge that we're working hard to complete all necessary steps involved with your cases(s). We'll keep you in the loop at all times, and notify you of any delays. In the meantime, you get hours back in your diary – which you could use to pursue new clients, or even spend time with family.

### 4. We deliver

We'll be in touch when everything's tied up, giving a full overview of what's been completed, along with any necessary documentation.

# FAQs

### How much does it cost?

This will vary depending on the complexity of the case. But to give an example, a typical pension switch might cost approximately £450. We'll always discuss the details of a case with you before giving a clear estimate. Please note these costs are subject to change.

### How long does it take to complete a case?

Like cost, this will differ on a case-by-case basis. We strive to have everything completed within 15 working days, but this can vary. We'll always keep you in the loop if there are delays, such as receiving details from a provider.

### Can I have the same paraplanner each time?

We allocate paraplanners based on how well their specialisms and skills match with what you need help with. This ensures you receive the most suitable support. On occasion, this might result in a different paraplanner being assigned.

### Is there a limit on usage?

No, we're devoted to support you in whatever capacity you need. Having said that, submitting a large number of cases may require a conversation to help us prioritise. If you need assistance on a more comprehensive and ongoing basis, we can work with you to arrange this.

### How do I pay?

We ask that you pay within 30 days of receiving a completed case. There's no need for payment upfront. We'll provide you with an invoice which contains our bank details.

### Can you help with the plan information that's needed for a case?

Sourcing plan information can be time consuming, and we can help with that. Our internal admin team can issue LOAs directly to providers and obtain the plan information on your behalf. They'll make sure the required ceding scheme information is available to the paraplanner for the completion of your case.

## Let's chat

**Interested in discovering more?**

We'd love to hear from you.
Get in touch to see how we can help:

**paraplanning@sandringham.co.uk**

01484 504900 (option 6)

# Who we are

At Sandringham, we're on a mission to provide great outcomes for our clients while helping our advisers build profitable and sustainable businesses, in a safe and supported environment.

We do the heavy lifting for you. When you partner with us, you'll access our independent and far-reaching central investment proposition while enjoying all the benefits our in-house expertise has to offer, meaning you'll spend more time with clients and less on paperwork.

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