

SIFA



Professional Compliance, Professional Connections
Complimentary Services

When you engage the support of SIFA, you can be safe in the knowledge that your business will receive the highest standard of support.

From regulatory guidance through business support propositions and our commitment to professional development, our complimentary services are designed to be a perfect fit for directly authorised firms.

Regulation:

Compliance Helpdesk – Our experienced staff take great pride in providing outstanding levels of support.

Pensions Helpdesk – The highly regarded pensions and technical team are only ever a phone call away.

Business Compliance Hub – From a library of templates to guidance on your GABRIEL return, this comprehensive resource provides all the support you need for the background running of your business.

Pensions Technical Library – Every document you could ever require relating to pensions.

Regulatory Updates – Delivered straight to your inbox and providing all the news from the regulator and how it might affect your business.



Business Operations:

Vision – The fully compliant advice journey. The Vision operating route provides a readymade proposition using our complimentary technology, while our Compliance Framework option allows you to create your own proposition using your preferred tools.

Verbatim – The independent, end-to-end investment solution – easy to use, independent, and designed to help you demonstrate the value of your advice.

Distribution Technology's Dynamic Planner – This award winning planning and client management tool integrates with market leading platforms and portals. (Usually £85 per month.)

Synaptic Product and Fund Research Tool – A comprehensive suite of research tools designed to integrate with your back office systems. (Usually £125 per month.)

Mortgage Club – Free membership of the UK's third largest mortgage club, providing exclusive and semi-exclusive deals and general insurance.

Simply Protect – Exclusive enhanced commission rates from six industry leading protection providers.

SimplyEnrol – To help you with the complex auto enrolment market, SimplyEnrol uses industry leading software to provide a complete solution.



Professional Development

Events programme – delivered at a variety of locations and spanning a range of business areas, the SIFA events programme provides advisers the opportunity to learn, share best practice and network, while providing essential structured CPD.

CPD Portal – A fully comprehensive and compliant learning zone which will assist you with maintaining your Statement of Professional Standing.

New Model Business Academy – Supporting advisers to achieve higher qualification through training, best practice seminars and online resources, the NMBA provides support on all things relating to professional development.

To find out more about any of our services, please call 01484 439 or email info@SIFA.co.uk



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