



COMPLIMENTARY
SERVICES

AT A GLANCE

SimplyBiz only supports directly authorised firms, meaning the services we provide are designed specifically for your business. When you choose to receive our support, you receive the following complimentary services as part of your membership:

REGULATION

Compliance Helpdesk

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

Pensions Technical Library

Every document you could ever require relating to pensions.

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 operations of your business.

Compliance & Technical Times

Our regular compliance update will keep you on top of all regulatory changes.

“Before we consider introducing a new service, we always ask ourselves the question, ‘will this benefit the firms we serve?’”

Matt Timmins

Joint Managing Director
SimplyBiz Group



BUSINESS OPERATIONS

Vision

Your fully compliant advice journey. The pre-approved Vision and Compliance Framework routes support independent and restricted post-RDR operating models.

Verbatim

The 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.)

RSM Funds Research Tool

A fund selection and investment recommendation tool.

SimplyBiz Mortgages

Free membership of SimplyBiz Mortgages, the UK's third largest mortgage club, providing exclusive and semi-exclusive deals and general insurance support.

Simply Protect

Exclusive enhanced commission rates from six industry leading protection providers.

SimplyEnrol

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

Protection Connection

A wide-ranging resource - including training, sales aids and support - designed to enhance your protection proposition.

Company Website

Your own professional website that you update yourself. (Hosting fee of £6 + VAT per month applies.)



PROFESSIONAL DEVELOPMENT

Simply Events

Our events programme spans 250 events annually and provides advisers with the opportunity to learn, share best practice and network, while providing essential structured CPD.

New Model Business Academy

Supports advisers to achieve higher qualification through training, best practice seminars and online resources, the NMBA provides support on all things relating to professional development.

CPD Portal

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

Adviser Media Player

Featuring presentations, webinars, and thought leadership discussions, the AMP helps advisers develop skills in a range of business areas.