

**HELPING YOU
BUILD A VALUABLE
BUSINESS**



SimplyBiz

PART OF THE SIMPLYBIZ GROUP

COMPLIANT, EFFICIENT & VALUABLE

As the UK's leading provider of regulatory and business support services, we know what advisers want. Running a complaint, efficient and valuable business is what our Members tell us tops their wish list and so that's where we focus our services.

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We currently help over 6,000 financial professionals to manage their FCA compliance responsibilities - no one else has our level of expertise - and the breadth of our support reflects our commitment to supporting firms in every aspect of their advice.

Regulation is at the core of our business and advisers receive the very best support to ensure they remain complaint. On top of this, we have built a complete support service to provide advisers with efficiency in their operations and the opportunities to grow their business and create real sustainable value.

EFFICIENCIES

Through our size and scale, we provide all Member Firms with free and heavily discounted tools which not only provide efficiencies but, when compared to the market rates they would be paying outside of the SimplyBiz Group, actually saves them money:



SIMPLY INTELLIFLO PLUS

A quality back office system is a key component of an efficient advice firm. From helping ease the processes involved in administration to helping you manage client relationships and nurture leads, Intelligent Office's solution provides everything advisers need.

We offer Intelliflo at a significantly reduced price, saving £50 per licence on the market price.

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DYNAMIC PLANNER

The quality of Dynamic Planner's risk profiling tool places it amongst the leading tools on the market and provides peace of mind that you are satisfying the FCA's requirements. The solution features a built-in planning tool, portfolio analysis and cash flow modelling to support your advice.

All Members receive complimentary licences for Dynamic Planner.



SYNAPTIC FUND & RESEARCH

The FCA's requirement that you can demonstrate that you've searched the market for the best product for your client means that having a quality research solution is essential. The Product & Fund Research Tool quickly scours thousands of products allowing you to find the solutions that meet your clients' needs, and create a short research summary or a full suitability report to demonstrate your process.

Members receive their first licence as complimentary and additional licences at a significantly reduced cost.

GROWTH PROPOSITIONS

So, with compliance and efficiency installed in each of our Members' practices, it's on to helping them to grow their business and drive up value. Within this short guide, we have provided details of some of the services open to our Members, with many more available as standard:

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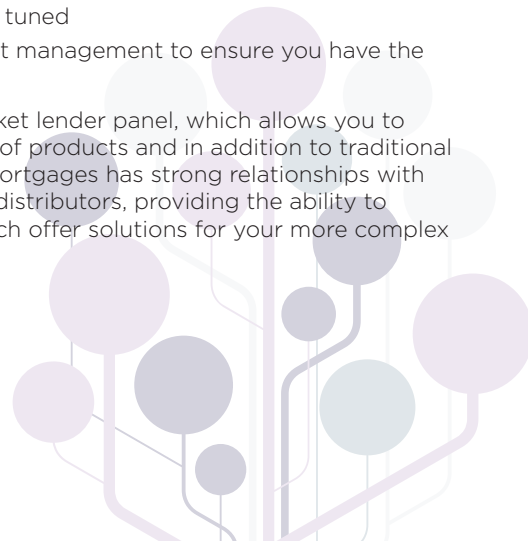
SIMPLYBIZ MORTGAGES

SimplyBiz Mortgages supports over 2,600 intermediaries in obtaining competitive procurement fees and with business placement. We also offer one point of access to a complete range of ancillary products associated with mortgages, including commercial and overseas mortgages, as well as access to conveyancing specialists.

By using SimplyBiz Mortgages, you benefit from:

- Exclusive and semi-exclusive rates from the industry's leading lenders
- Complimentary licences for Mortgage Brain and The Key (subject to minimum number of completions)
- Dedicated mortgages helpdesk for all your hard to place cases
- Comprehensive document template resource to ensure compliance
- Extensive programme of professional development events to keep your skills tuned
- Dedicated account management to ensure you have the very best support

With a whole of market lender panel, which allows you to access a wide range of products and in addition to traditional lending, SimplyBiz Mortgages has strong relationships with specialist mortgage distributors, providing the ability to access products which offer solutions for your more complex client requirements.



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SIMPLYBIZ INVESTMENT SERVICES

Our dedicated investment proposition will provide you with all the tools, documents, research and access to wrappers and platforms you need to ensure your client receive a complete service. This will help to:

- Keep clients' attitude to risk at the heart of your process
- Ensure asset allocation is appropriate for a client's risk profile
- Make appropriate and suitable investment selection, with robust due diligence
- Add value by showing clients powerful reports about their financial future
- Build stronger relationships with clients using efficient back office processes
- Increase the value of your business by using robust, streamlined processes

A quality investment proposition begins by having the right service backing you up and we've been helping firms to develop their investment propositions for over 14 years now and our expert team are ready to offer support.

PENSION TRANSFER BUREAU

Following changes to regulation last year, many advisers are now unable to offer advice on pension transfers and even those that can don't always want to take on the risk.

The Bureau provides a transfer service for both Occupational Money Purchase and DB/Final salary schemes and comes with a number of key benefits:

- Outsource those schemes upon which you are not authorised to advise, or simply don't wish to advise on
- Receive 50% of the fee payable (subject to min fee)
- No danger of 'client poaching'
- SBS is responsible for the advice given and has the required PI cover in place
- Following a transfer, it's back to you for ongoing advice

Our Members completed over 600 cases in the first year since the Bureau's launch and we expect this number to grow significantly in the months ahead.

WORKPLACE ACADEMY

Whether you are already active in the workplace or looking to get started, Workplace Solutions can help you to maximise the potential of this valuable market.

At the heart of the proposition is our Workplace Academy, designed to provide advisers with the necessary skills, knowledge and support to advise in this area.

On enrolling onto the academy, you will attend workshops as well as receive online support across key modules, including:

- Group risk
- Workplace health and wellbeing
- Business protection and business insurance
- Credit and finance
- Workplace pensions and automatic enrolment
- Salary exchange and benefits platforms

In addition to the academy, we have a number of supporting solutions, from our leading auto enrolment solution, which includes free employer planner, to our Simply Benefits services, ensuring you have all the tools you need to provide employers and indeed their employees, with a complete service.

GENERAL INSURANCE

For many firms, general insurance is a valuable income stream, which is why we have created a dedicated solution to service both yours and your client's needs.

GenIus, offers you three ways of placing GI business.

- **Click** - use the portal to source products and obtain quotes online, advise your client and return to the system to make the policy live
- **Call** - enlist the help of a GenIus expert. Talk through difficult or unusual cases, and let someone else find the best quotes for you
- **Refer** - pass our team the client's contact details and we'll call them and take care of the whole process on your behalf. We deal with the client and take the compliance responsibility, you earn the commission.

Whether general insurance is already a core part of your client proposition or you're keen to grow your business into this area, GenIus provides a variety of solutions.

APS LEGAL AND ASSOCIATES

With over half of UK adults without a will, there is huge potential for advisers to add will writing, estate planning and probate services to their client proposition.

APS Legal provides advisers with the necessary training to offer will writing service in-line with the Code of Conduct of The Institute of Professional Will writers - the only code for will writers to be approved by the Trading Standards Institute.

Having worked hard to build and manage your clients' wealth, you have an intricate knowledge of their assets, placing you in the perfect position to help them plan for what happens when they are gone. APS Legal provides training to help you deliver these services with confidence, and the support of the legal experts at APS, while adding a valuable new income stream, while adding a valuable new income stream.

SIMPLY PROTECT

Protection has become an essential part of many firms' revenue streams - it's also regarded as one of the largest growth areas in the advice market. As such our dedicated protection portal provides all the features you need to write business straightaway.

- Powered by Synaptic's industry leading Weblines tool
- Search, quote and set policies live, all within one streamlined system
- Access to a comprehensive range of products to meet your clients' protection needs
- Receive enhanced commission rates from leading protection providers

If you're looking to grow your advice provision in this area, the ease and simplicity of the Simply Protect proposition enables firm to quickly develop protection into a valuable part of the advice process.



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JOINING SIMPLYBIZ

For more information about how to join SimplyBiz and start benefitting from our range of growth services, please call 01484 439128 or email new2@simplybiz.co.uk

We have regionally based development managers across the UK and they will be delighted to meet with you to discuss your requirements.

www.simplybiz.co.uk

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