



FINTEL RESULTS | HY22

AGENDA

01 OVERVIEW & HIGHLIGHTS

02 FINANCIAL REVIEW

03 STRATEGIC DELIVERY

04 CURRENT TRADING & OUTLOOK

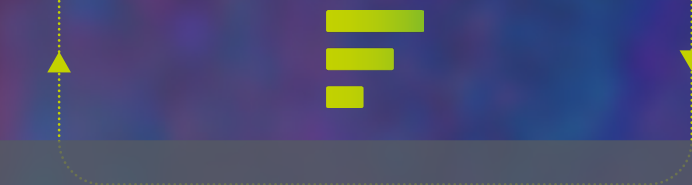
05 APPENDICES

RESILIENT BUSINESS

SCALABLE FINTECH
& SERVICES
PLATFORM

DIVERSIFIED,
REPEAT
CUSTOMER BASE

UNRIVALLED
MARKET
POSITION



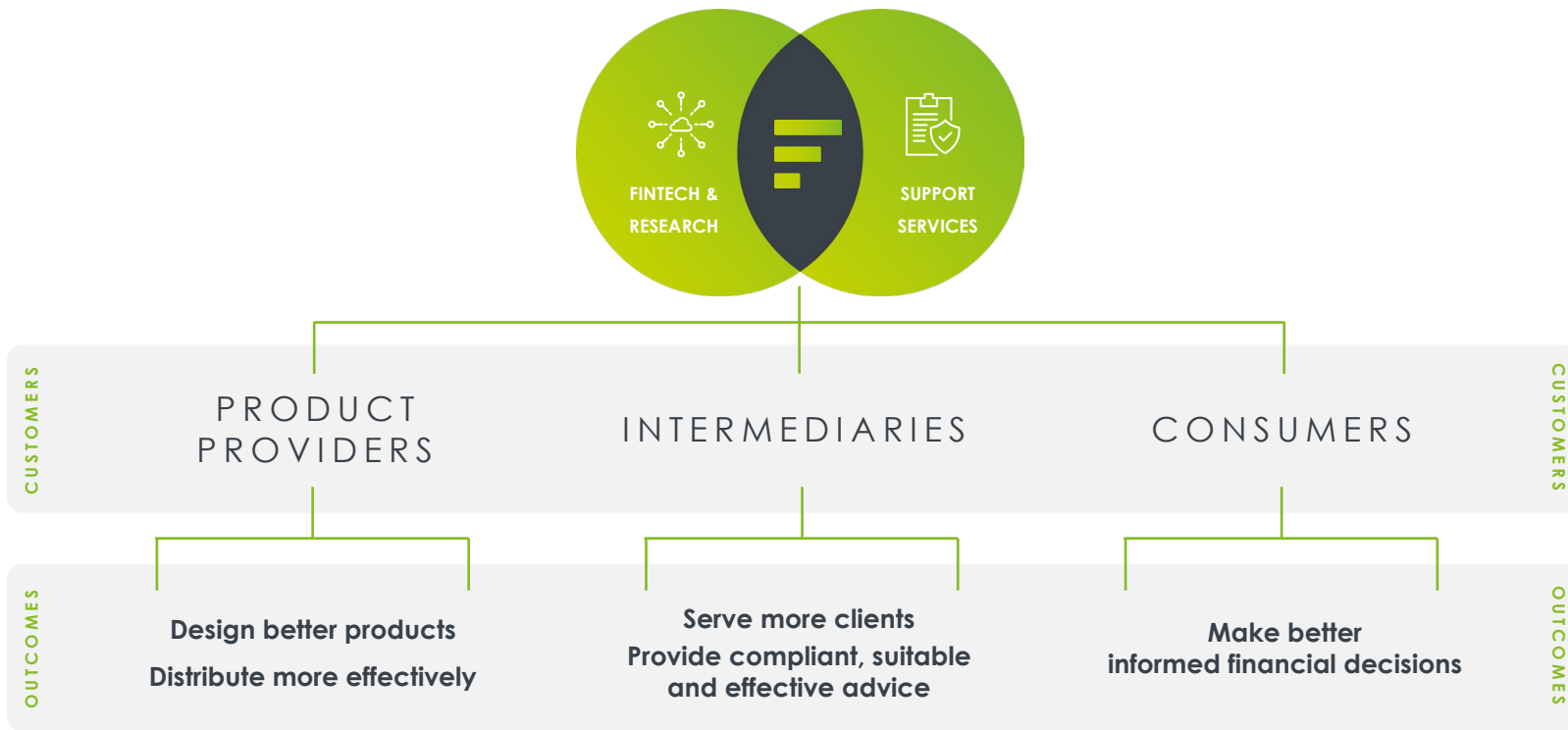
FINANCIAL
AGILITY

CASH
GENERATIVE
BUSINESS MODEL

QUALITY,
RECURRING
EARNINGS

SUSTAINABLE GROWTH

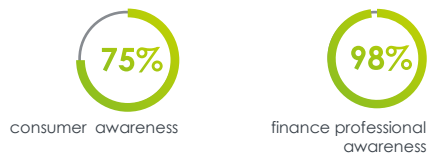
FINANCIAL SERVICES, INFORMATION & DATA



INDUSTRY LEADING BRANDS

HIGHLY ENGAGED AND SATISFIED CUSTOMER BASE

HIGH RECOGNITION



UNRIVALLED TRUST



UNMATCHED PENETRATION



RECORD AWARD WINNING

Professional Adviser Awards - 5 consecutive years



HIGH SATISFACTION



HIGH RETENTION



BUSINESS OVERVIEW – CONNECTED PLATFORM

REGULATORY EXPERTS – FINANCIAL PRODUCT EXPERTS – EXPERTS IN FINTECH & WORKFLOW



HIGHLIGHTS – CORE BUSINESS

STRATEGIC DELIVERY

STRONG TRADING

CONTINUED GROWTH & PROFITABILITY

9% **Strong revenue growth**
Trading in-line with upper end of medium-term objectives

30% **Solid adjusted EBITDA margin**
Delivered alongside reinvestment into digital capabilities

124% **Strong cashflow conversion**
High operating profit to operating cashflow conversion

RESILIENT BUSINESS

BUSINESS CRITICAL SERVICES



Diversified, engaged and loyal customer base
Financial Intermediaries – product providers



Sector leader
Strong track record of growth and delivery



Non-discretionary services
Regulatory support – Fintech – Insights

CONFIDENT OUTLOOK

WELL-POSITIONED FOR GROWTH

66% **Quality, recurring earnings**
High visibility of future revenues
SaaS & subs

£7.6m **Significant financial reserves**
Deleveraged, with undrawn £45m RCF
cash



Strong growth drivers
Increasing regulation
Demand for digital & insight services

STRATEGIC FOCUS – CORE* BUSINESS

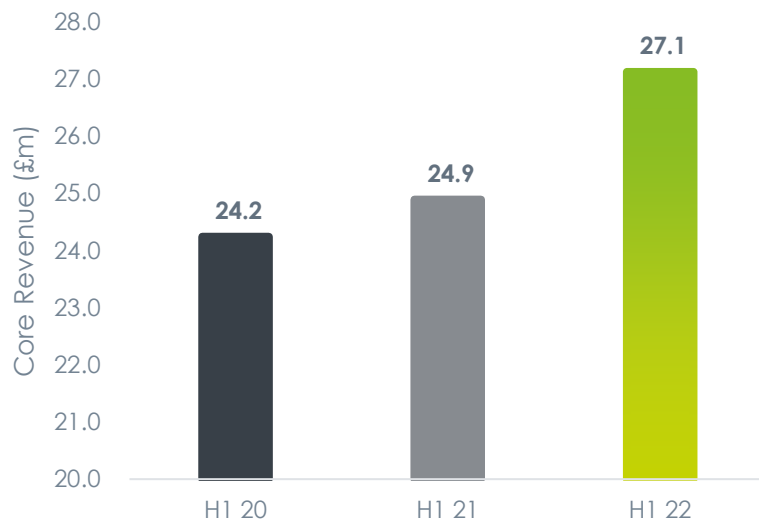


* Core business excludes revenues from Panel Management and Surveying.

TRACK RECORD OF DELIVERY

RESILIENT BUSINESS MODEL

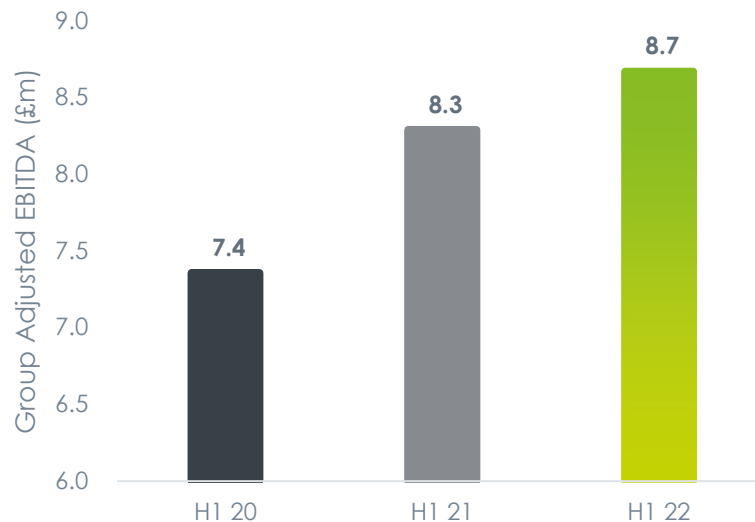
Core Revenue



STRATEGIC
DIVESTMENTS

COVID PANDEMIC

Group Adjusted EBITDA



STRATEGIC
DIVESTMENTS

COVID PANDEMIC



AGENDA

01 OVERVIEW & HIGHLIGHTS

02 FINANCIAL REVIEW

03 STRATEGIC DELIVERY

04 CURRENT TRADING & OUTLOOK

05 APPENDICES

RESILIENT BUSINESS

SCALABLE FINTECH
& SERVICES
PLATFORM

DIVERSIFIED,
REPEAT
CUSTOMER BASE

UNRIVALLED
MARKET
POSITION

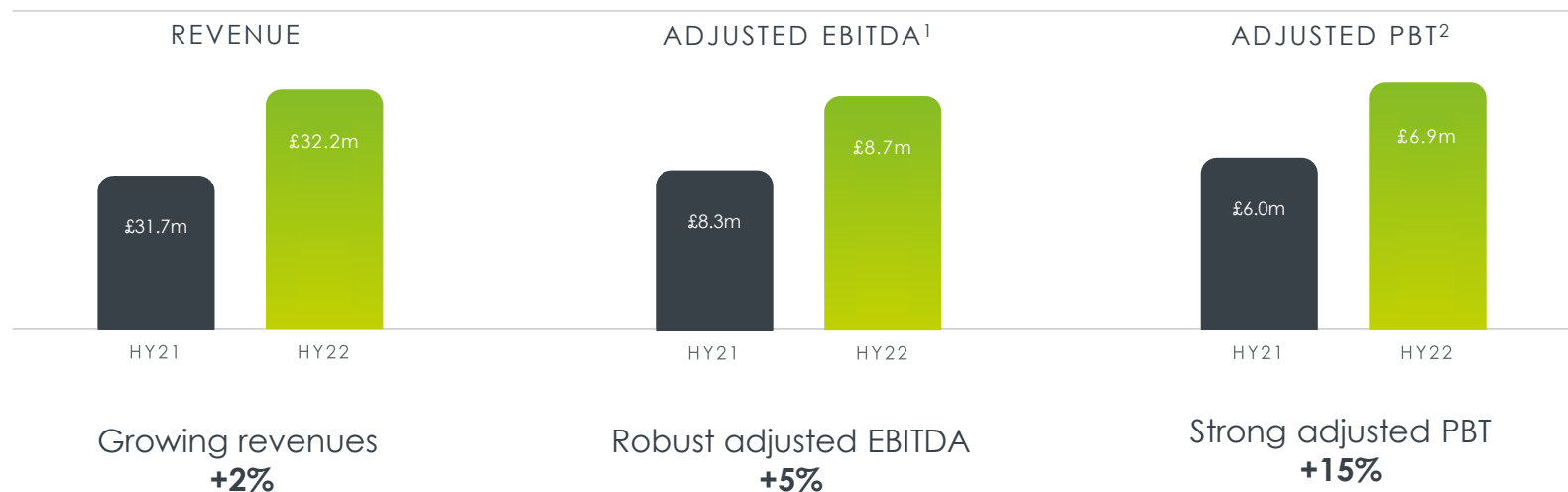
FINANCIAL
AGILITY

CASH
GENERATIVE
BUSINESS MODEL

QUALITY,
RECURRING
EARNINGS

SUSTAINABLE GROWTH

HIGHLIGHTS – FINANCIAL

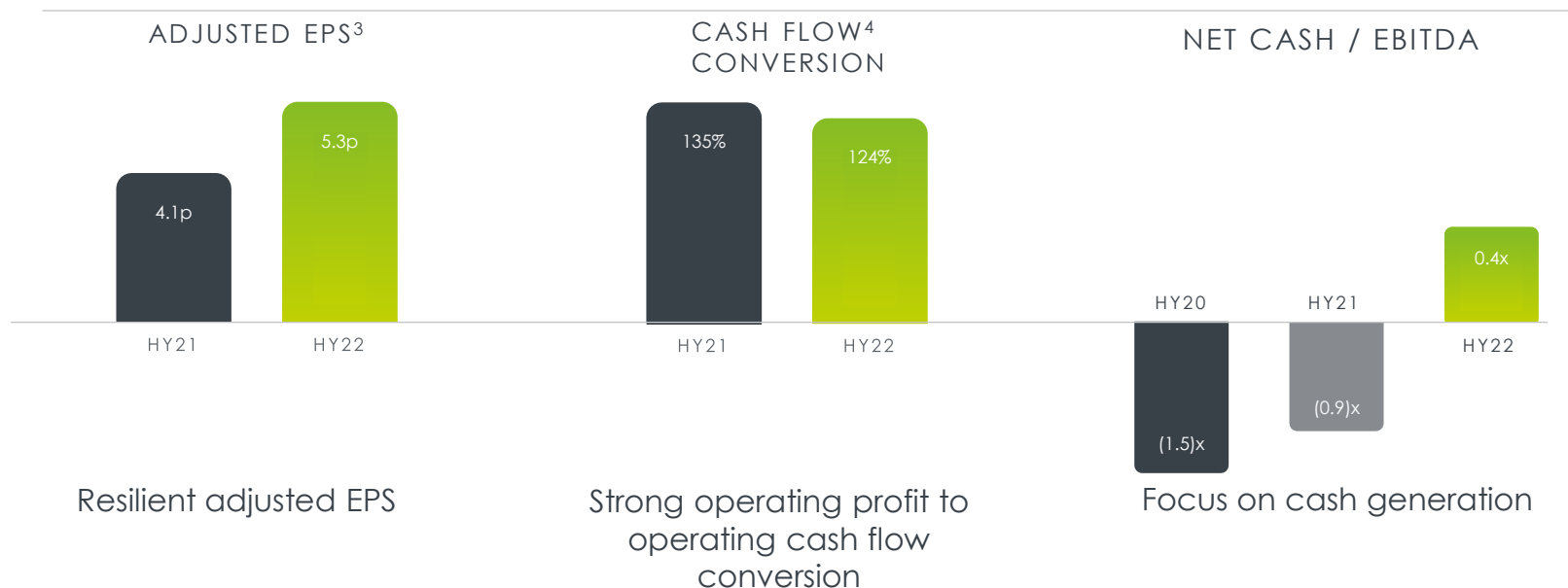


¹Adjusted EBITDA is earnings before interest, tax, depreciation, amortisation, share option charges and exceptional operating costs.

²Adjusted PBT is calculated as adjusted profit before tax, which excludes exceptional operating costs and amortisation of intangible assets arising on acquisition.



HIGHLIGHTS – FINANCIAL



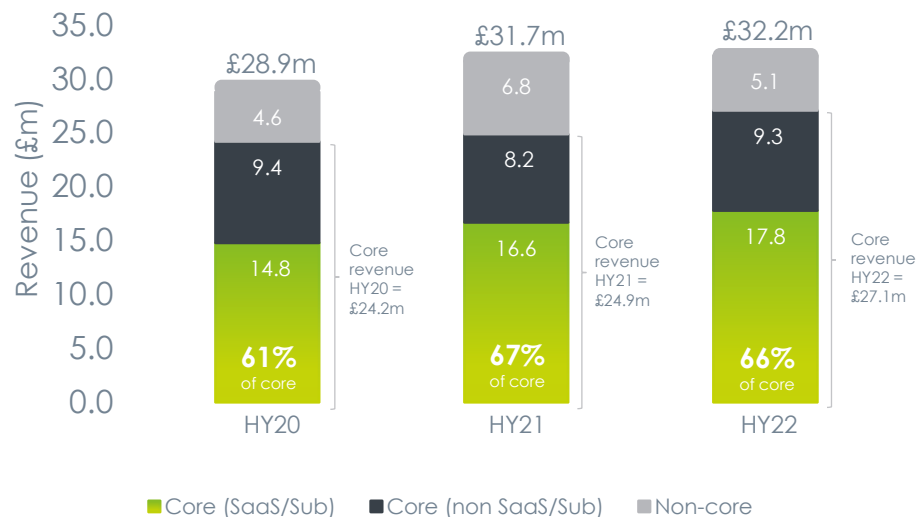
³ Adjusted earnings per share is calculated as adjusted profit after tax attributable to owners of the company, which excludes operating exceptional costs and amortization of intangible assets arising on acquisition divided by the average number of Ordinary Shares in issue for the period.

⁴ Underlying cash flow conversion is calculated as underlying cash flow from operations (adjusted operating profit, adjusted for changes in working capital, depreciation, amortisation, CAPEX and share based payments) as a percentage of adjusted operating profit.



FINANCIAL REVIEW

CORE* VS NON-CORE REVENUE SPLIT



- CORE REVENUE GROWTH: **9% (£2.2m)** vs HY21
- Total revenue growth: **2% (£0.5m)** vs HY21
- SaaS and Subs revenue growth: **7% (£1.2m)** vs HY21

SEGMENTAL PERFORMANCE

INTERMEDIARY SERVICES

	HY21	HY22	Change
Core revenue	£11.0m	£11.4m	4%
Revenue	£12.6m	£11.4m	(10%)
Gross profit ⁶	£3.9m	£4.5m	15%
Gross margin ⁷	30.9%	39.3%	▲

DISTRIBUTION CHANNELS

	HY21	HY22	Change
Core revenue	£6.2m	£6.3m	2%
Revenue	£11.3m	£11.4m	1%
Gross profit ⁶	£5.1m	£4.5m	(12%)
Gross margin ⁷	46.0%	39.2%	▼

FINTECH & RESEARCH

	HY21	HY22	Change
Core revenue	£7.8m	£9.4m	22%
Revenue	£7.8m	£9.4m	22%
Gross profit ⁶	£4.7m	£5.7m	21%
Gross margin ⁷	59.7%	60.9%	▲

- Resilient core revenues in all three divisions
- Total gross profit increased to £14.7m (HY21: £13.7m), up 7%
- Infrastructure and support costs up £0.6m to £6.0m (HY21: £5.4m), 11%
- Adjusted EBITDA up to £8.7m (HY21: £8.3m), up 5%

⁶Gross profit is calculated as revenue less direct operating costs.

⁷Gross profit margin is calculated as gross profit as a percentage of revenue.



FINANCIAL REVIEW

UNDERLYING OPERATING CASH FLOW CONVERSION

£m	HY21	HY22
Group operating profit	6.5	7.2
Depreciation and amortisation	1.4	0.8
Share based payments	0.4	0.7
Adjusted EBITDA	8.3	8.7
Net changes in working capital	1.4	0.9
Net capital investment	(0.9)	(0.7)
Underlying cash flow from operations	8.8	8.8
Operating profit to operating cash flow conversion	135%	124%
Adjusted EBITDA to operating cash flow conversion	106%	101%
Tax	(1.2)	(1.3)
Interest	(0.4)	(0.2)
Lease payments	(0.4)	(0.3)
Free Cash Flow	6.8	7.0
Cash flow conversion of adjusted EBITDA	81%	81%

124% UNDERLYING OPERATING PROFIT TO OPERATING CASH FLOW CONVERSION⁵

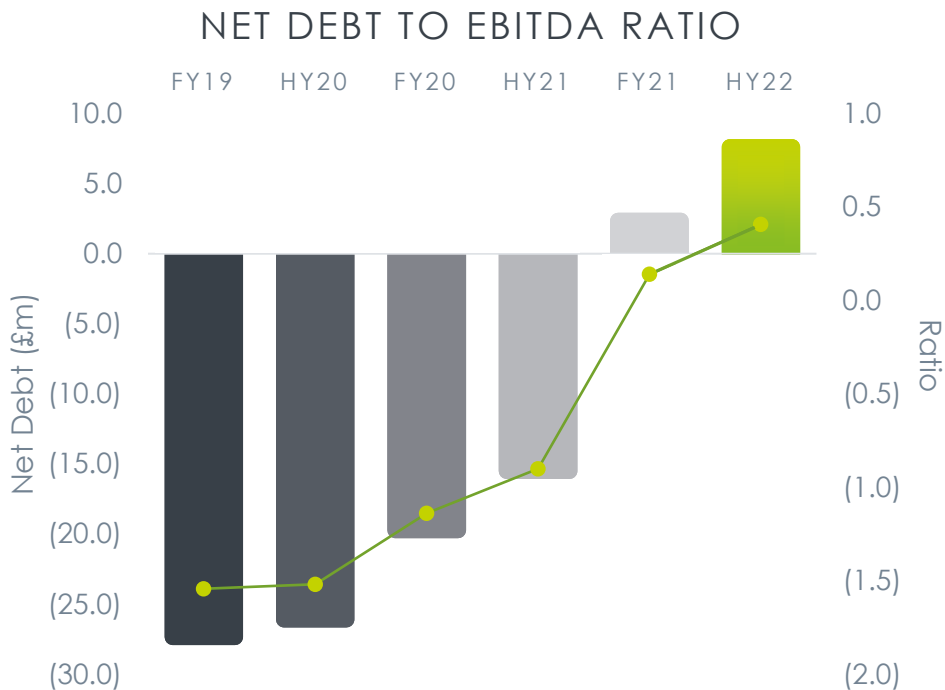
- Underlying operating cash flow conversion ensures that focus is maintained on operating efficiency and working capital management, and removes any volatility over time created by variations in indebtedness or external influences outside of Fintel's control, such as the change to Corporation Tax rates

⁵Underlying operating cash flow conversion is calculated as underlying cash flow from operations (adjusted operating profit, adjusted for changes in working capital, depreciation, amortisation, CAPEX and share based payments) as a percentage of adjusted operating profit.



FINANCIAL REVIEW

CASH GENERATIVE - DELEVERAGING



STRONG CONTINUING CASH FLOWS

- **Positive net cash of £7.6m**
(HY21: net debt of £15.5m)
- Strategic headroom for future acquisitions
- Increased financial flexibility and resources
- Undrawn £45m revolving credit facility



FINANCIAL SUMMARY



ROBUST FINANCIAL
PERFORMANCE



INCREASING REVENUE
QUALITY IN CORE BUSINESS



STRONG CASH
GENERATION



SIGNIFICANT
FINANCIAL
RESOURCES



PROGRESSIVE
DIVIDEND POLICY
H1'22 – 1p Interim Dividend



AGENDA

01 OVERVIEW & HIGHLIGHTS

02 FINANCIAL REVIEW

03 STRATEGIC DELIVERY

04 CURRENT TRADING & OUTLOOK

05 APPENDICES

RESILIENT BUSINESS

SCALABLE FINTECH
& SERVICES
PLATFORM

DIVERSIFIED,
REPEAT
CUSTOMER BASE

UNRIVALLED
MARKET
POSITION

FINANCIAL
AGILITY

CASH
GENERATIVE
BUSINESS MODEL

QUALITY,
RECURRING
EARNINGS

SUSTAINABLE GROWTH

DIVISIONAL HIGHLIGHTS

INTERMEDIARY SERVICES DIVISION

INTERMEDIARY SERVICES



c. 3,100

INTERMEDIARY FIRMS

INCREASED PROFITABILITY

driven by:

15%

growth in gross profit to £4.5m
(HY21: £3.9m)

DIGITISATION

- Continued software adoption by membership
- Digitisation of service upgrades
 - Digitisation of advice quality review service
 - Scaling of hybrid compliance service

6.5%

growth in software license income to £3.1m (HY21: £2.9m)

4.1%

growth in ARPC to £7,314
(FY21: £7,026)

SERVICE ENHANCEMENT

- To meet market demand in response to new regulation
 - Launch of Consumer Duty hub
 - Launch of specialist Consumer Duty support services

47

member NPS score
(FY21: 43)



DIVISIONAL HIGHLIGHTS

DISTRIBUTION SERVICES DIVISION

DISTRIBUTION CHANNELS



OVER 400
INDUSTRY PARTNERS

INCREASED EARNINGS QUALITY

driven by:

SCALING OF DISTRIBUTION AS A SERVICE ("DaaS")

- >30 partners converted to date, exceeding 2022 revenue conversion target
- Successful expansion of DaaS into protection market

>60%

of partner revenue converted to subscription revenue (HY21: c.40%)

DIGITISATION OF SERVICE MODEL

- 2nd phase of Partner Portal in development
- Delivering enhanced insights for partners
- Restructuring of flagship events programme
- Meeting demand for hybrid delivery
- Protecting programme from potential future physical restrictions

>170

hybrid events delivered in HY22

>13,000

bookings at our hybrid events programme in HY22

GROWTH IN SHARE OF MORTGAGE MARKET

- Strong demand in applications with strong expected completion rate in H2*
- Launch of Buy to Let plus, expanding presence in BTL market

24.5%

increase application volume to £14.5bn (HY21: £11.6bn) and 3.7% increase in completions

5.8%

market share (FY21: 5%)

* During H1 2022 the length of time to completion has been elongated due to capacity issues throughout the property buying process chain and also the pre-booking of mortgage rates for H2 remortgages.

DIVISIONAL HIGHLIGHTS

FINTECH & RESEARCH DIVISION



INCREASED REVENUES

driven by:

22%

Increase in revenue to £9.4m
(HY21: £7.8m)

SIGNIFICANT GROWTH IN FINTECH REVENUES

- Platform enhancement to meet market demand in response to new regulation
 - Launch of new Matrix Fair Value module
 - Enhanced funds research module
 - Xplan back office system integration with proprietary advice software

24%

growth in Fintech software revenue
to **£4.6m** (HY21: £3.7m)

ACCELERATED GROWTH IN PROPRIETARY ADVICE SOFTWARE RECOMMENDATIONS

- Following roll out of enterprise deals with Tatton and Verbatim
- Expanding data and insights footprint

15%

increase in HY22 Fintech recommendations
to **>£42bn** (HY21: >£36bn) on a 12
month rolling basis

GROWTH IN PRODUCT RATINGS REVENUE

- Expansion of research and insights platform to meet market demand in response to new regulation
 - Continued expansion of risk mappings and ratings service
 - Continued expansion of investment reviews service

12%

growth in product ratings revenue
to **£4.2m** (HY21: £3.8m)

AGENDA

01 OVERVIEW & HIGHLIGHTS

02 FINANCIAL REVIEW

03 STRATEGIC DELIVERY

04 CURRENT TRADING & OUTLOOK

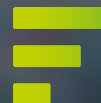
05 APPENDICES

RESILIENT BUSINESS

SCALABLE FINTECH
& SERVICES
PLATFORM

DIVERSIFIED,
REPEAT
CUSTOMER BASE

UNRIVALLED
MARKET
POSITION



FINANCIAL
AGILITY

CASH
GENERATIVE
BUSINESS MODEL

QUALITY,
RECURRING
EARNINGS

SUSTAINABLE GROWTH

CONFIDENT OUTLOOK

GROWTH DRIVERS

Increasing regulatory pressure
driving demand across customer base

Ongoing demand for technology
across customer base

Market consolidation and disaggregation
driving opportunities for growth

Economic climate increasing demand for
financial advice and product ratings

VALUE CREATION

Digitisation of core platform
improving margin and earnings quality

Conversion and scaling of DaaS
increasing recurring revenues

Expansion of proprietary software
growing revenues, and data & insights

Investment in hero brands
strengthening brand equity and market
position

FINTEL – SCALABLE BUSINESS / DIGITAL TRANSFORMATION

1 SCALABLE DIGITAL SERVICES PLATFORM

> **10,000** financial intermediaries served

> **3,500** client firms use our Fintech

2 UNRIVALLED MARKET POSITION

75% consumer awareness of Defaqto brand

34% of directly authorised retail investment and mortgage firms use SimplyBiz

3 DIVERSIFIED, ENGAGED AND LOYAL CUSTOMER BASE

6yr 5m – average intermediary member tenure

>**60%** of product provider revenue on multi-year DaaS contracts

4 FINANCIAL AGILITY

£7.6m Net Cash

£45m RCF

5 CASH GENERATIVE BUSINESS MODEL

124% underlying operating cash flow conversion*

6 QUALITY, RECURRING INCOME

66% SaaS and subscription recurring revenue in core business



We are **FINTEL** 

AGENDA

01 OVERVIEW & HIGHLIGHTS

02 FINANCIAL REVIEW

03 STRATEGIC DELIVERY

04 CURRENT TRADING & OUTLOOK

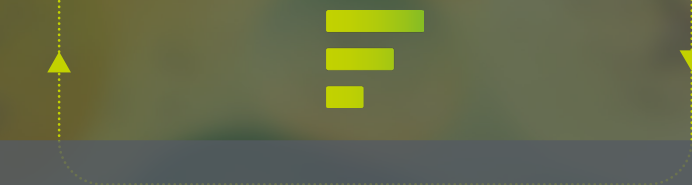
05 APPENDICES

RESILIENT BUSINESS

SCALABLE FINTECH
& SERVICES
PLATFORM

DIVERSIFIED,
REPEAT
CUSTOMER BASE

UNRIVALLED
MARKET
POSITION



FINANCIAL
AGILITY

CASH
GENERATIVE
BUSINESS MODEL

QUALITY,
RECURRING
EARNINGS

SUSTAINABLE GROWTH

APPENDICES INDEX

UNIQUE MARKET POSITION

1. Competitive
Moat

2. Market
Penetration &
Reach

RESILIENT CUSTOMER BASE

3. Outcome
Focused
Business

4. Operating at
scale

SCALABLE PLATFORM

5. Data &
Insight

6. Fintech &
Research

7. Data &
Distribution

HOLISTIC ESG STRATEGY

8. ESG Pillars

9. Embedding
the ESG strategy

10. Long-term
commitment

ACCELERATED GROWTH

11. Tatton
Partnership

HOUSE OF QUALITY BRANDS

12. Brand
Equity

13. Thriving
Workforce

14. Testimonials
& awards

COMPETITIVE MOAT

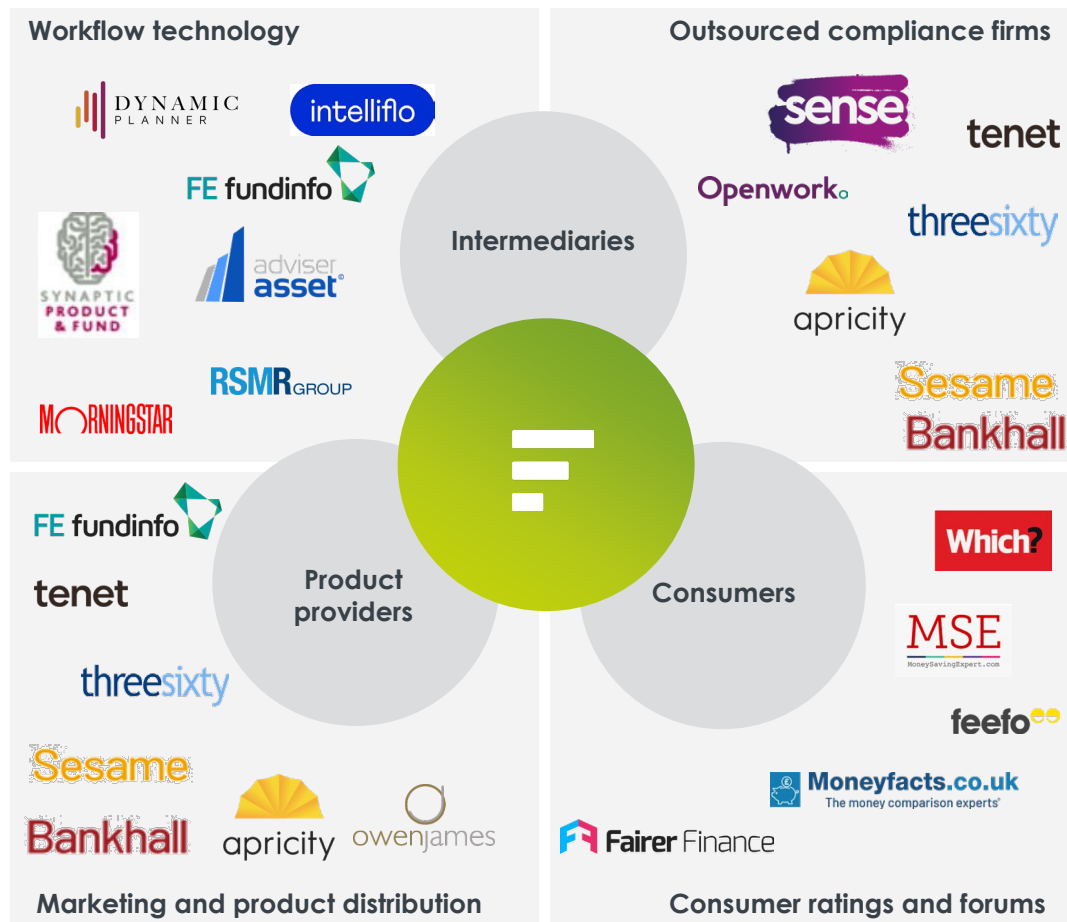
APPENDIX 1

UNIQUE MARKET POSITION,
OPERATING IN ALL FOUR
QUADRANTS

Operating in a large, complex market with a unique market position, we connect all three customer groups via our Fintech and service platform.

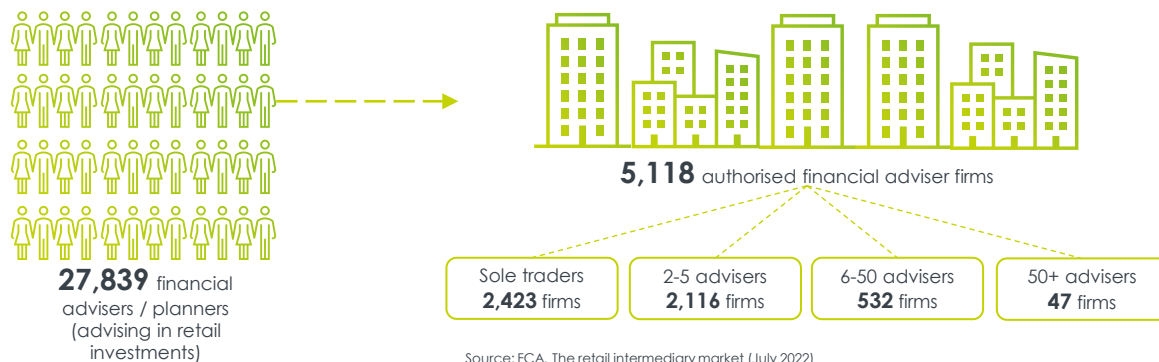
Our platform integrates:

- **Regulatory IP**
- **Proprietary Technology**
- **Market Insights and Analytics**



MARKET PENETRATION – INTERMEDIARIES

APPENDIX 2



>40%

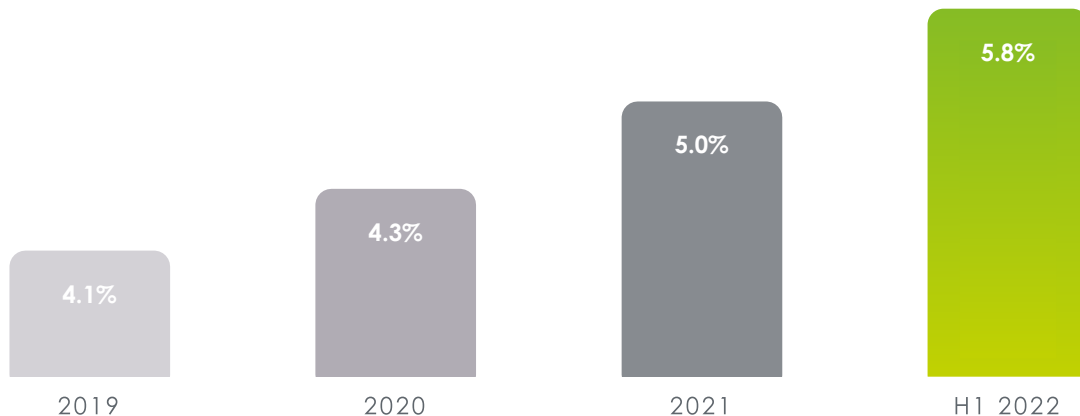
of directly authorised retail investment firms are SimplyBiz members



MARKET PENETRATION – MORTGAGES

APPENDIX 2

SimplyBiz Mortgages – market share of UK mortgage completions



Mortgage completions
volume in HY22*

UK Finance: £145.1bn total lending estimated for HY22 (2022 forecast = £281bn; 2021 total lending estimated = £313bn; 2020 total lending estimated = £244bn; 2019 total lending estimated = £268bn)

UK Finance figures exclude product transfers. Product transfers estimated at £223bn in 2021. Market share figures exclude product transfers

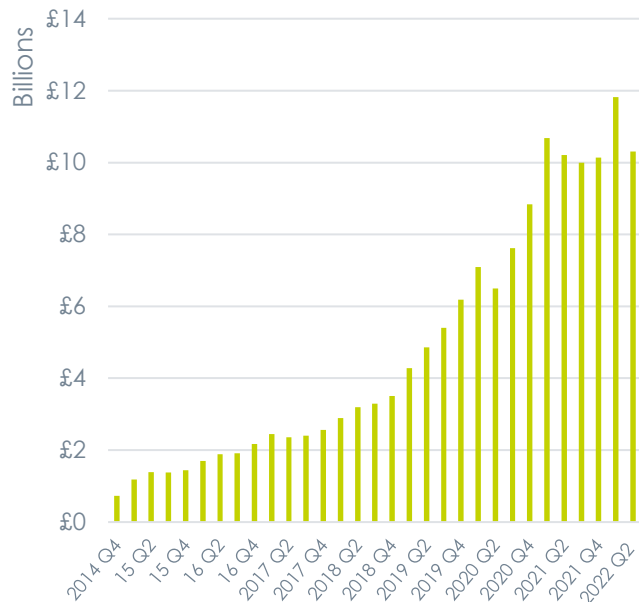
*Volume of completions includes product transfers



MARKET REACH – FINTECH & RESEARCH

APPENDIX 2

ENGAGE ADVICE SOFTWARE RECOMMENDATIONS



NETWORK EFFECT

DATA & INSIGHT SERVICES

Ratings



Fund Reviews



ESG Reviews

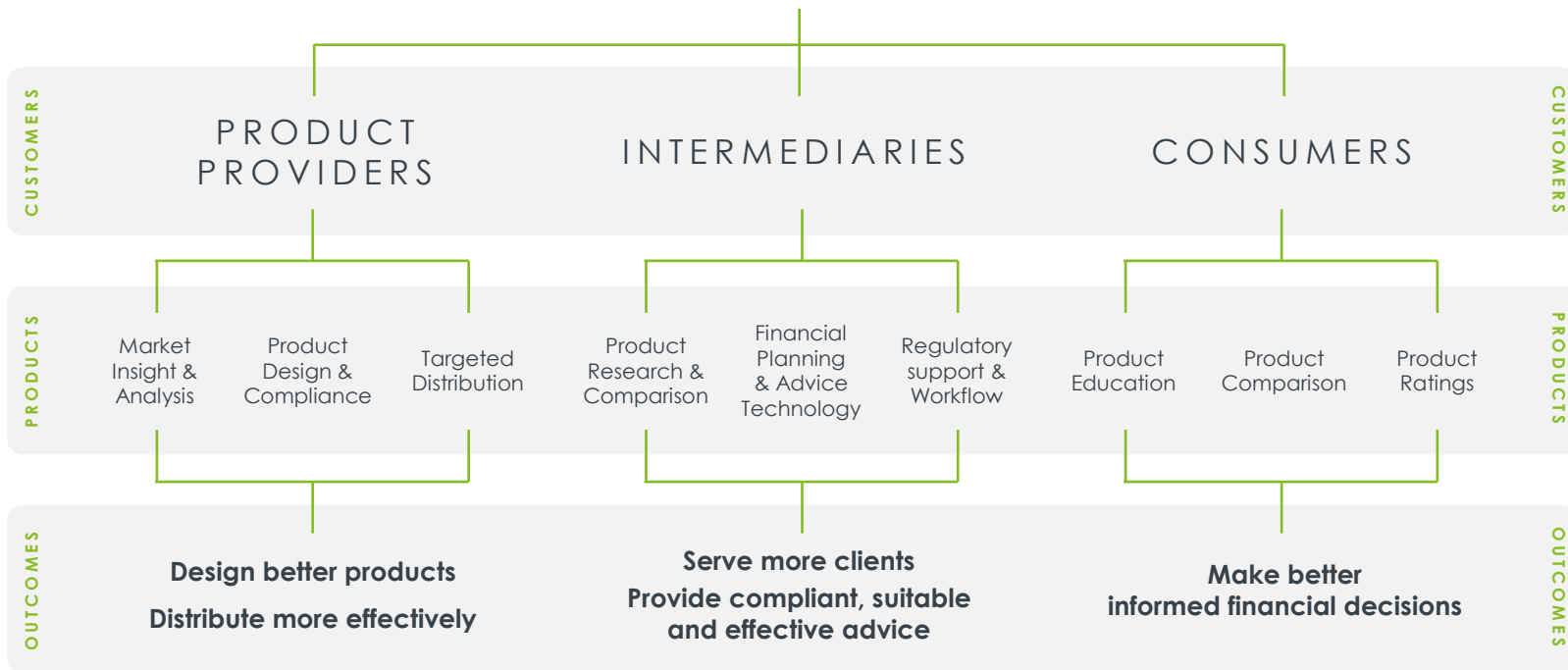


>£42bn

of recommendations were made through Fintel's proprietary advice technology Engage on a 12 month rolling basis

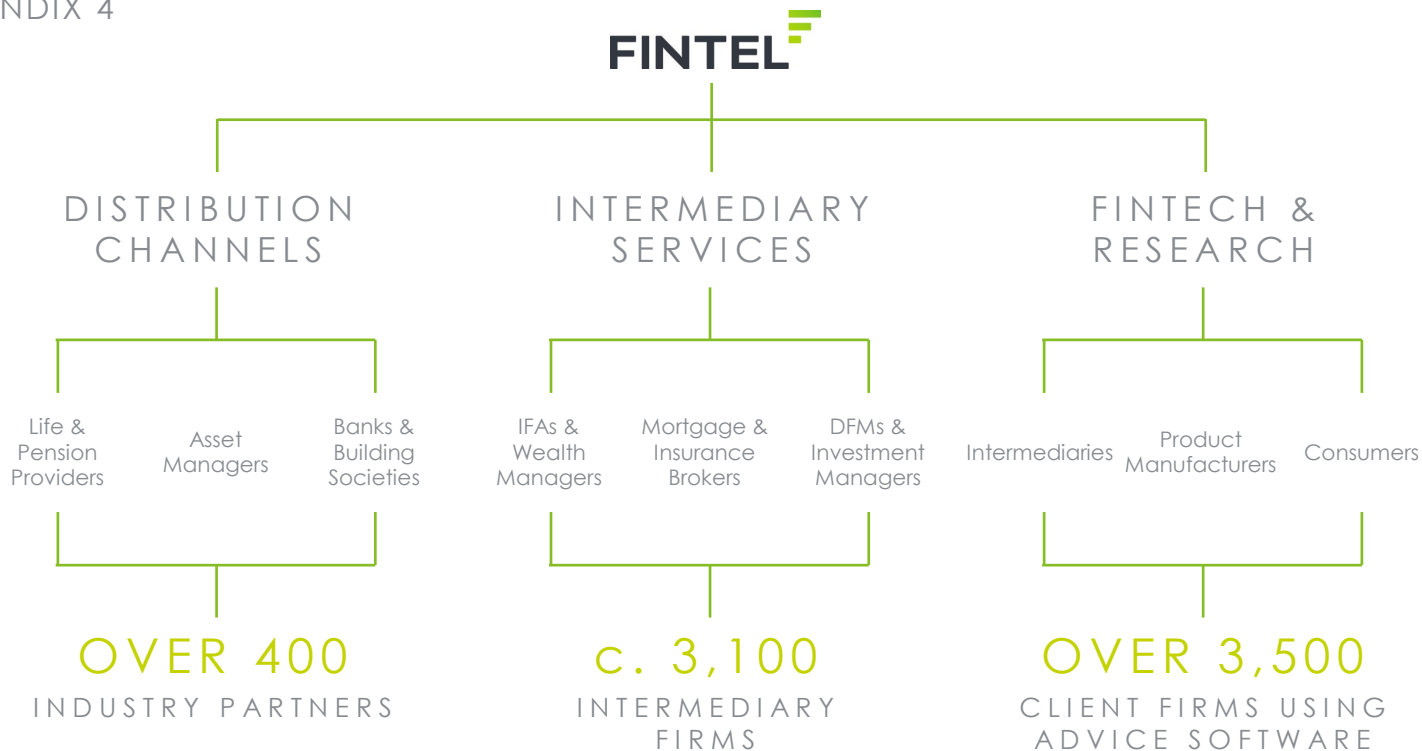
OUTCOME FOCUSED BUSINESS

APPENDIX 3



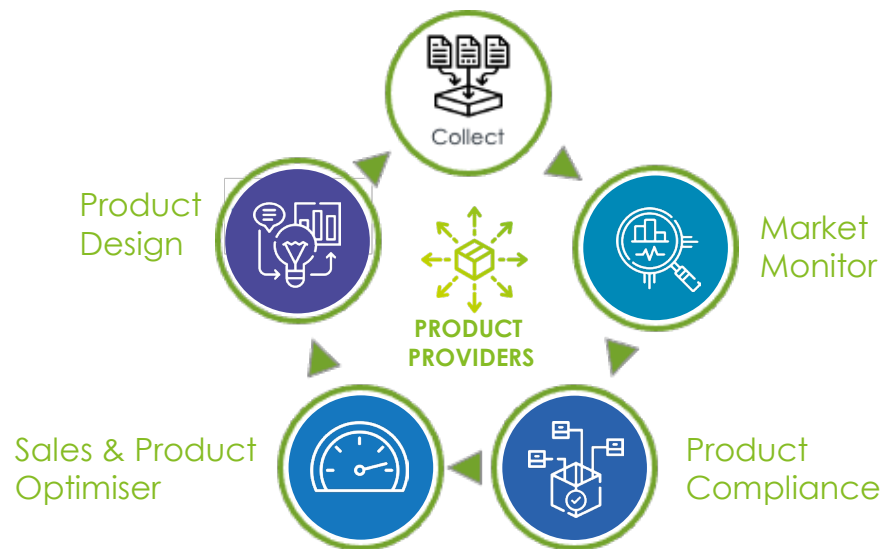
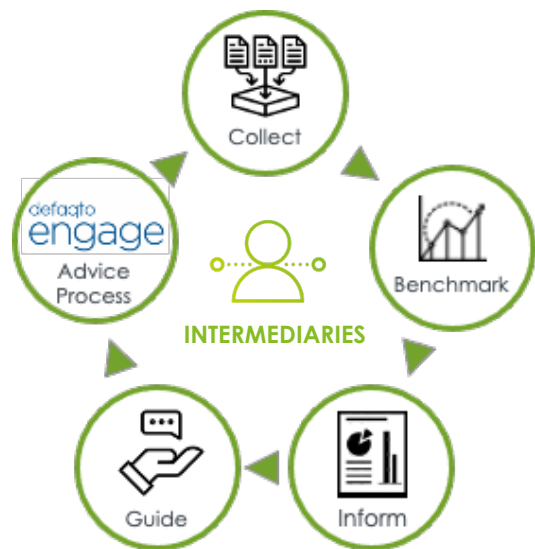
OPERATING AT SCALE

APPENDIX 4



DATA AND INSIGHT SERVICES

APPENDIX 5 - 'ALWAYS ON' ADVISER, PRODUCT AND MARKET ANALYSIS



FINTECH & RESEARCH SERVICES

APPENDIX 6



FINTECH

ENGAGE

Financial planning software backed by our expert research, used by 30% of IFAs.

MATRIX

Industry benchmarking tool providing whole of market comparison and scoring of different propositions.

COMPARE

Product comparison tool providing instant product comparisons to customer-facing professionals.

DIS

Data platform supporting price comparison websites in conveying accurate product data to consumers.



RESEARCH

STAR RATINGS

Quality, suitability and service assessments at a glance, covering over 14,000 products and 5,000 funds. Recognised by over 75% of consumers.



REVIEWS

Expert fund reviews and ESG reviews including analytics, panels, consultancy and events for asset managers and intermediaries, spanning 90,000 fund share classes 18,000 funds and 50 platforms.



DISTRIBUTION AS A SERVICE

APPENDIX 7



IMPROVED REVENUE QUALITY

- Distribution and Data service for product providers
- Multi year subscriptions – improving the quality and certainty of future revenues
- Expansion of offering into product development and protection services
- 60% revenue conversion achieved ahead of 2022 target



STRATEGY IN ACTION

APPENDIX 7

STRATEGIC DISTRIBUTION PARTNERSHIP WITH AVIVA & AVIVA INVESTORS



DISTRIBUTION AS A SERVICE PARTNERSHIP

SUBSCRIPTION SERVICE SPANNING RESEARCH, DATA, PRODUCT DESIGN AND TARGETED DISTRIBUTION



LAUNCH OF NEW SUSTAINABLE RETIREMENT SOLUTION

PRODUCT DESIGN ALIGNED TO DEFAQTO WORKFLOW TECHNOLOGY AND ESG CERTIFICATIONS



LICENSING OF STRATEGIC ASSET ALLOCATION (SAA)

LONG TERM AGREEMENT ALIGNING LONG TERM REVENUE AND GROWTH



This agreement allows us to build, support and deliver our savings and retirement ambitions in conjunction with Fintel, its member firms and their customers."

Brian Gabriel

Director of Distribution at Aviva



STRATEGIC ASSET ALLOCATION

APPENDIX 7



LONG TERM RECURRING REVENUE

- Strategic Asset Allocation (“SAA”) launched in partnership with Hymans Robertson
- Generating long term, recurring revenue via a share of product fee
- Strong pipeline of key strategic partners

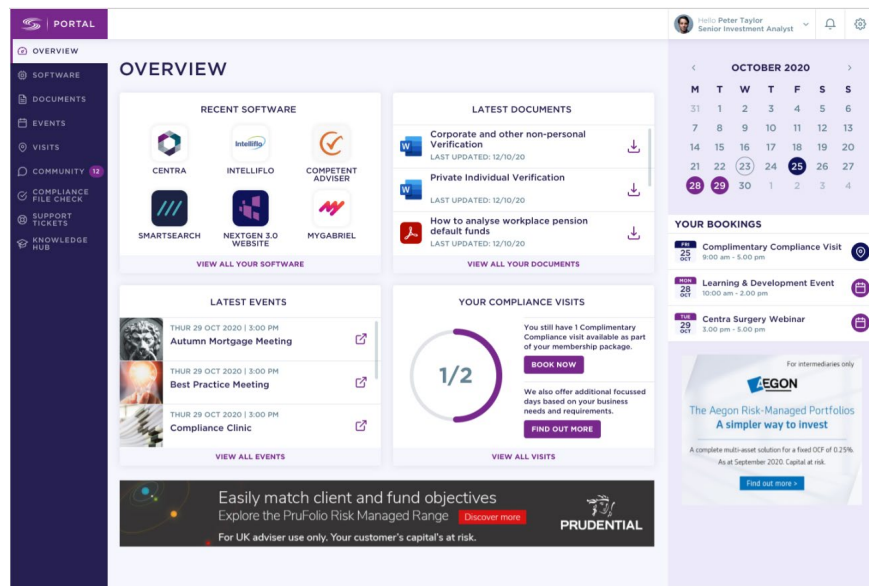


Morgan Stanley



DIGITAL SERVICE PLATFORM

APPENDIX 7



PORTAL ARCHITECTURE

- Single point access for all services
- Self serve model
- Access to tailored data and insights
- 2021 Beta partner portal launch
- 2022 Full partner portal launch
- 2023 Member portal architecture



HOLISTIC ESG STRATEGY

APPENDIX 8

BETTER BUSINESS

Having a positive impact on society and minimised impact on the environment

BETTER INDUSTRY

Improving the Retail Financial Services market, helping it operate more effectively and meet evolving customer needs

BETTER FUTURE

Empowering our people and broader communities, creating opportunities for all

INSPIRING BETTER OUTCOMES

By..

reducing our environmental impact, giving back to communities and maintaining best practice corporate governance.

Environmental
Footprint

Corporate
Governance

Sustainable business

By..

developing and improving products and processes through innovation, digitisation and education.

Innovation &
Digitisation

ESG
Enablement

Improved customer outcomes

By..

promoting diversity, learning and financial confidence.

Financial
Confidence

Thriving
Workforce

Community
Engagement

Opportunities for all

EMBEDDING OUR ESG STRATEGY

APPENDIX 9



ESG AND WELLBEING COMMITTEE FORMED
ACCREDITED LIVING WAGE EMPLOYER



INAUGURAL ESG REPORTING



LAUNCH OF MORTGAGE ACTION CLIMATE GROUP
CO-FUNDED BY SIMPLYBIZ MORTGAGES



MEMBERSHIP OF PROGRESS TOGETHER, FOCUSING
ON SOCIO-ECONOMIC DIVERSITY IN FS



BEST COMPANIES ACCREDITATION

PARTNERSHIP WITH WE ARE CHANGE TO ATTRACT
NEW TALENT INTO FS INDUSTRY

2022

FEB

MAR

APR

MAY

JUN



H2 2022 FOCUS

APPENDIX 9



ENHANCING OUR STRONG GOVERNANCE FRAMEWROK

- Group wide policy review
- Enhancement of risk management framework
- Enhancement of data security and cyber risk monitoring processes

ALIGNING TO WIDELY RECOGNISED REPORTING FRAMWEORKS

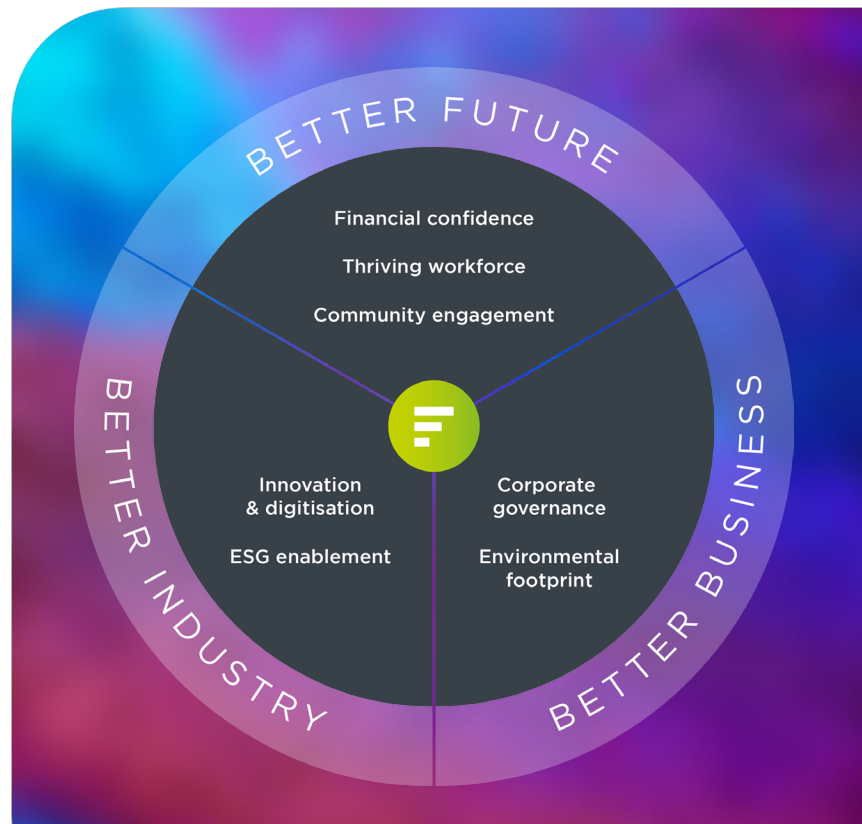


- Preparation for reporting against the TCFD framework



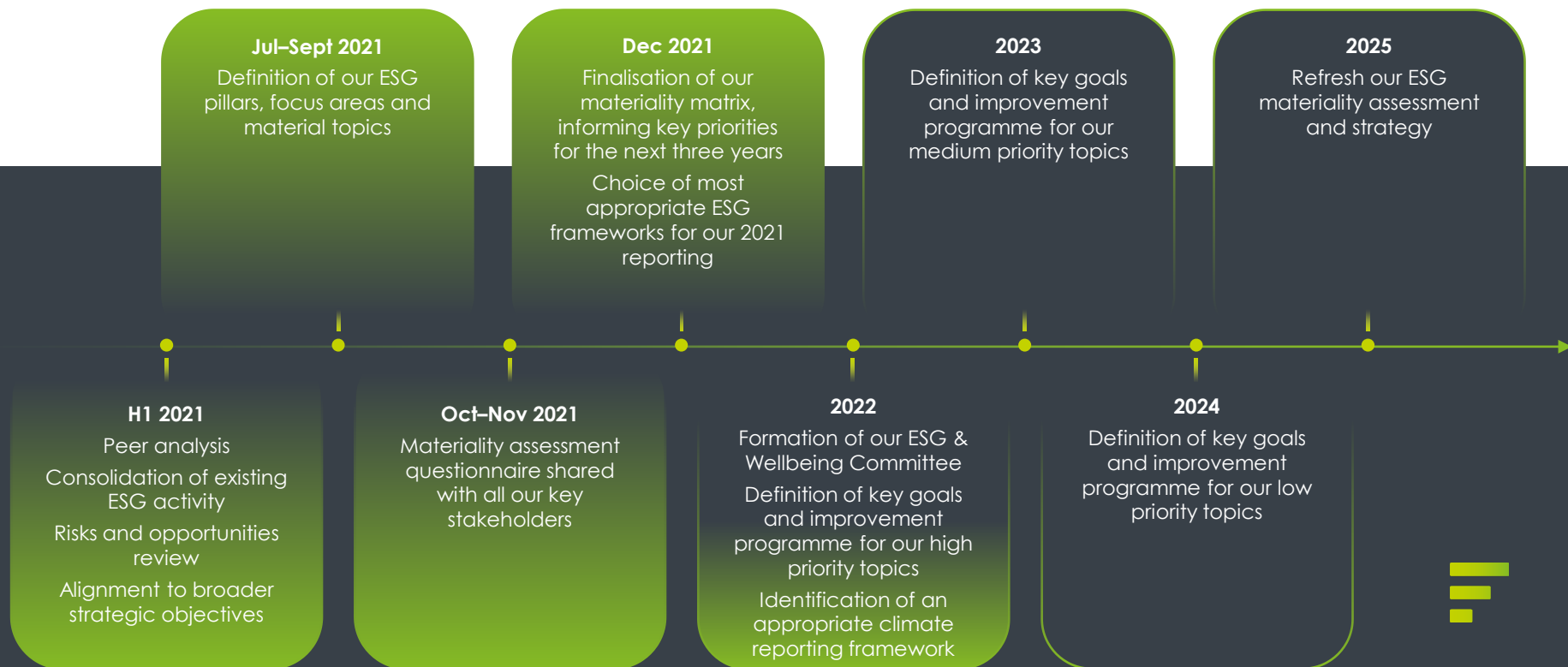
ESTABLISHING OUR BASELINE

- Expansion of diversity metrics
- Expansion of scope 3 emissions data



ESG ROADMAP – ONGOING COMMITMENT

APPENDIX 10



STRATEGIC PARTNERSHIP - TATTON

APPENDIX 11



Revenue growth

30% expansion of Fintech client base creates network effect



Revenue quality

Fintech contract
c. £1.4m pa x 5 years



Cash generation

Verbatim funds sale
realises up to £5.8m



MARKET PENETRATION

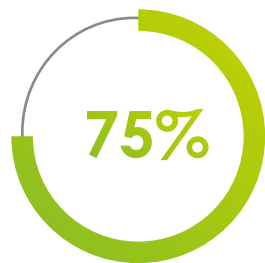
- £13m Fintech, distribution and fund management deal for minimum 5 years
- Fintel to provide proprietary advice technology to Tatton for up to 2,500 additional users
- Tatton to join DaaS and SAA
- Significant value creation
- Strategic disposal of Verbatim funds



DEFAQTO BRAND EQUITY

APPENDIX 12

RECOGNITION



CONSUMER AWARENESS



FINANCE PROFESSIONAL AWARENESS

TRUST



LEADING INDUSTRY BRANDS

Asset
Managers



Banks



Insurers/
Underwriters



Comparison
Sites



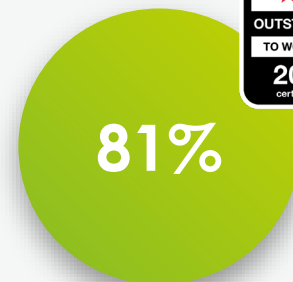
Intermediaries



THRIVING WORKFORCE

APPENDIX 13

- Accredited "Outstanding to work for" in 2022
- Track record of recruiting and retaining talent
 - 5.9 years average staff tenure
- Focus on internal mobility and progression opportunities
 - >70% of managerial vacancies filled internally in HY22
 - 30% of roles filled internally in HY22
- c.480 staff across five office locations
- Staff skill set and experience to support continued operational leverage



Staff engagement



PARTNER TESTIMONIALS

APPENDIX 14

Distribution as a Service

"Fintel are market leading within the UK Intermediated Wholesale market with their comprehensive Managed Distribution Service Agreement.

For Aviva Investors the agreement gives us **insight into trends and needs of advisers and their clients**. Through their data insight packs they are **harnessing the power of data in this market**.

Productivity is a major challenge for this market for both product manufacturers, as well as adviser firms. Fintel are **creating a more efficient marketplace**."

James Tothill, Head of Strategic Alliances

"Fintel continue to innovate and enhance their services and propositions to UK advisers, and these remain **focused on driving efficiency, and (most importantly) client outcomes**.

Utilising their data insights and events program combined with the Distribution service has **made our adviser engagement more relevant, targeted, and efficient than ever**.

So, when you combine all of this alongside the quality of the teams and people, it becomes an easy decision to partner, and **commit to this strategic partnership, both now and in the future**."

David Beacham, Distribution Director

"The MDS package allows us to construct a bespoke campaign package aligned to our corporate objectives using a combination of events, marketing comms and call campaigns.

We also **benefit from quarterly research and analytics insights so we can continually assess and evolve our ongoing strategic engagement**.

We value **Fintel's market leading approach** and support of advisers across the UK and are delighted to be one of their key partners."

Ross MacKinnon, Head of Intermediary Business Development

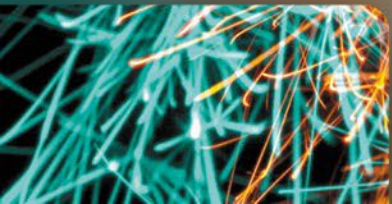
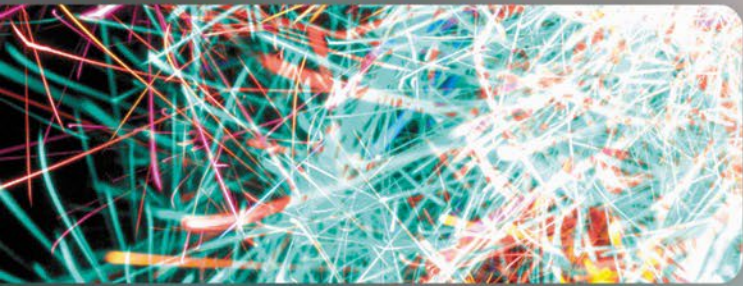


AWARDS

APPENDIX 14

Professional Adviser AWARDS 2022 WINNER Best Support Services for Advisers (Generalist)	Professional Adviser AWARDS 2021 WINNER Best Support Services for Advisers (Generalist)	MI AWARDS 2021 WINNER MORTGAGE CLUB OF THE YEAR	MI AWARDS 2020 WINNER SURVEY / VALUATION BUSINESS OF THE YEAR	MI AWARDS 2019 WINNER MORTGAGE CLUB OF THE YEAR	money marketing AWARDS 19 WINNER BEST SUPPORT SERVICE	w&f 2018 Wealth & Money Management <i>awards</i> The SimplyBiz Group Best Financial Services Compliance Provider 2018 - UK
Professional Adviser AWARDS 2019 WINNER Best Support Services for Advisers	Professional Adviser AWARDS 2020 WINNER Best Support Services for Advisers (Generalist)	WORLD BUSINESS AWARDS Compliance First	2018 Scottish enterprise awards Compliance First Best Financial Advisory Compliance & Support Firm 2018	fr BEST MORTGAGE CLUB 2017 HIGHLY COMMENDED	GLOBAL BUSINESS EXCELLENCE SIMPLYBIZGROUP MOST OUTSTANDING COMPLIANCE AND BUSINESS SUPPORT PROVIDER FOR FINANCIAL ADVISERS, 2019-UK	w&f 2018 Global Business Excellence <i>awards</i> The SimplyBiz Group 2018's Leading Provider of Network/Support Services - UK
Professional Adviser awards 2018 WINNER Best Support Services for Advisers	osb Group BTL Distributor of the Year SimplyBiz Mortgages	SIMPLYBIZ MORTGAGES 2016 BEST SPECIALIST CLUB Precise Mortgages	SIMPLYBIZ 2016 WORKSHOP PROGRAMME OF THE YEAR Precise Mortgages	mortgagestrategy AWARD WINNERS 2015 BEST MORTGAGE CLUB	mortgagestrategy AWARD WINNERS 2014 BEST MORTGAGE DISTRIBUTOR	wealth finance 2016 alternative investment awards SimplyBiz Group Best for Compliance & Business Advisory Services - UK & Most Innovative Fund Selection Software - Simply Funds
FIVE STARS BACK OFFICE & SUPPORT FINANCIAL ADVISER SERVICE AWARDS 2021	CorporateLiveWire FINANCE AWARDS 2018 WINNER	FINANCE AWARDS 2016 Outstanding Contribution towards MCO Consumer Credit Centre	FINANCE AWARDS 2016 CORPORATELiveWire	CorporateLiveWire FINANCE AWARDS 2017 WINNER	Professional Adviser awards 2013 WINNER Best Adviser Support Service SimplyBiz	Professional Adviser awards 2012 WINNER Best Network/Support Services





THANK YOU