

PARAPLANNING

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HUNTSWOOD

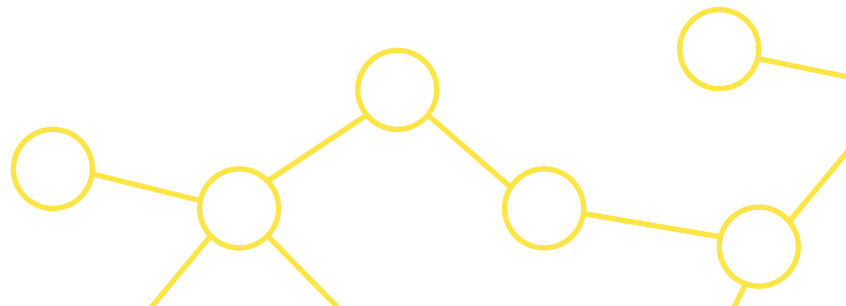
# THE IMPORTANCE OF THE PARAPLANNER

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Paraplanning is a time-consuming, complex, yet crucial part of your business. A solution that enables a high quality and scalable approach to dealing with fluctuations in case volumes is key

In a post-Retail Distribution Review (RDR) environment, it is more important than ever for advisers to undertake - and, importantly, evidence - comprehensive research and suitable client recommendations.

Ultimately, firms need to meet regulatory requirements while achieving commercial goals - and paraplanners play a key role by enabling the delivery of high quality advice, timely execution and operational efficiency.



# HUNTSWOOD'S PARAPLANNING SERVICES

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## WE SUPPORT YOUR PARAPLANNING REQUIREMENTS WITH:

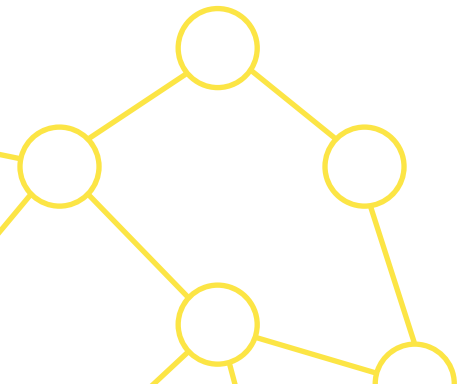
- Fully outsourced or co-sourced paraplanning functions with fully trained and experienced experts, on your site or from our outsourced service centre
- The sourcing of permanent paraplanners for your in-house team

Huntswood will work cases from submission right through to completion of suitability letters and fully updated fact finds. We are able to support the full range of advice transactions, including: pension transfers, income drawdown, investment replacements, inheritance tax and new business, with our services comprising:

- Full case data gathering
- Critical yield calculations / charge comparisons

- Confirming viability of transfer / encashment (including the necessary tax calculations where appropriate) and identifying any unusual features
- Making recommendations, if required
- Providing advisers with regular updates on case progression

If required, we can provide a fully managed end-to-end solution, including day-to-day management, first line quality checks, setting of service level agreements (SLAs) and training provision, among other aspects.



# BENEFITING YOUR ADVICE PROPOSITION

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## PARAPLANNING OFFERS A NUMBER OF BENEFITS

- Outsource time-consuming tasks - including compiling suitability reports, performing means testing and assessing consumers' personal circumstances, while also generating customer recommendations
- Enables advisers to spend more time with existing and prospective new clients
- Enhances the quality of advice by enabling advisers to spend more time on value added client-facing activity
- Increases margins through faster and more resource efficient completion of cases

A circular portrait of a man with short, dark hair, wearing a dark suit jacket, a white shirt, and a dark tie. He is smiling and looking directly at the camera. The background of the portrait is a solid yellow color.

**QAHIR GULAMANI**  
REGULATORY CONSULTANT



**BEFORE USING HUNTSWOOD I  
HAD NEVER USED A PARAPLANNER  
PREFERRING TO DO ALL THE WORK  
MYSELF. I NOW FIND I CANNOT DO  
WITHOUT THEIR SERVICE.**



Jeremy Harrison  
Senior Partner  
St. James's Place Wealth Management

# WHY HUNTWOOD

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**HUNTWOOD HAS PROVIDED A  
LEADING PARAPLANNING SERVICE  
SINCE 2007.**

**HUNTWOOD'S PARAPLANNING  
SERVICES ALLOW YOUR ADVISERS  
TO SPEND MORE TIME WITH  
NEW AND EXISTING CLIENTS,  
STRENGTHEN RELATIONSHIPS AND  
PROVIDE AN EXCELLENT STANDARD  
OF FINANCIAL ADVICE.**

## **HIGH CALIBRE RESOURCE**



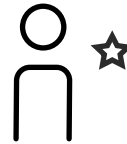
- High quality financial services professionals are identified, on-boarded and deployed swiftly
- Dedicated team of 20 resourcing specialists, with in-depth knowledge of local markets
- Industry leading database of over 12,000 financial services professionals
- Robust referencing and vetting to ensure we only place the highest calibre candidates (only 5% of applicants are successful)

## COMPLETE PROJECT OVERSIGHT



- Stringent oversight by experienced delivery managers ensures outstanding quality of delivery
- Detailed and actionable management information (MI) to track project performance and implement any necessary adjustments
- Dedicated Huntswood relationship managers ensure a close and responsive approach

## HIGH QUALITY DELIVERY



- Faster completion of cases and with an extremely high rate of recommendations that are suitable first time - as high as 98.46%
- Paraplanners operate alongside our regulatory subject matter experts for enhanced industry and business insight
- Our paraplaning model has vastly improved productivity at a number of firms, and has delivered cost efficiencies of 30% on average

## FULLY FLEXIBLE SERVICE



- We can deliver outsourced off-site paraplaning services on a price-per-case basis, if required
- For added mobility and flexibility, we have a range of project delivery suites permanently commissioned and available for client occupation
- We adopt a flexible, agile approach; able to make 'real-time' headcount changes in line with fluctuating case volumes



# HUNTSWOOD

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