

Forward financial thinking

# Member services update

Investment Forums R1: 2025

Forward financial thinking

- REGULATORY EXPERTISE
- BUSINESS SUPPORT
- FINANCIAL TECHNOLOGY



# Simplybiz member update

*'A chance to hear first-hand about how we are supporting you and your business'*

## Our strategy

Update on key strategies and initiatives



## Engagement

Find out how to maximise your membership



## Adviser insight

Your insight is helping shape our support





# Adviser insight

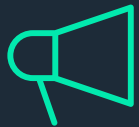
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Real positivity across our profession



Mitigating regulatory risk still high on the agenda



Focus remains on providing more clients with more advice



Creating efficiencies and value is business key drivers



# Adviser insight

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**69% of advisers say the Budget has changed client conversations!**



Real positivity across our profession



Mitigating regulatory risk still high on the agenda



Focus remains on providing more clients with more advice



Creating efficiencies and value is business key drivers



Retirement, IHT/Estate planning & investments top client conversations



Advisers want economic stability & changes to pension & tax rules



# Intermediary services

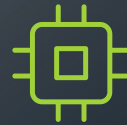
Delivering more value and control to financial advisers



## Regulatory expertise

Compliance services    Advice quality & regulatory consultancy    Regulatory business consultancy

Reduce risk, improve consumer outcomes



## Financial technology

Integrated back-office & planning    Product research & sourcing    Learning & regulatory technology

Streamline the advice process, increase efficiency



## Business support

Professional development    Proposition development    Growth & exit services

Improve performance, increase value



# Running my business



# Advising my clients



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# Defaqto Engage

- **Two FREE Engage Premium licences**
- All-encompassing solution
- Save time AND money

Over **1,250** licences taken up so far!



*“The upgrade has enabled me to accelerate my business processing, through consolidating the advice tools we use, to have a true all-in-one system. We’ve been looking for this type of solution for years, and now we’ve found it!”*  
**Robert Surtees, Affinity Group FS**



# Engage – your instant tech upgrade

	Engage Premium	Engage Core	FE Fundinfo	Dynamic Plinner	Cashcalc	Voyant	Capita	Fintegrate
End-to-end financial planning	✓	✓		✓			✓	✓
Cash flow planning	✓		✓	✓	✓	✓	✓	
Risk profiling	✓	✓	✓	✓	✓	✓	✓	✓
Detailed research for funds & products	✓	✓	✓	✓			✓	
Protection research	✓						✓	
Ratings & reviews	✓	✓	✓	✓			✓	
Pension, platform & product switching	✓						✓	✓
Suitability report production	✓	✓		✓				✓
Analytics	✓							
Back office/CRM integrations	✓	✓	✓	✓	✓	✓	✓	





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## CRM solutions

Offering you choice...

**IFA**



**Mortgages**



## Your business – your choice

- Market leading solutions
- Integration is key
- Discounted rates
- Training & support



# Compliance digitisation



Fully digitised compliance solution for all



Create much needed efficiencies

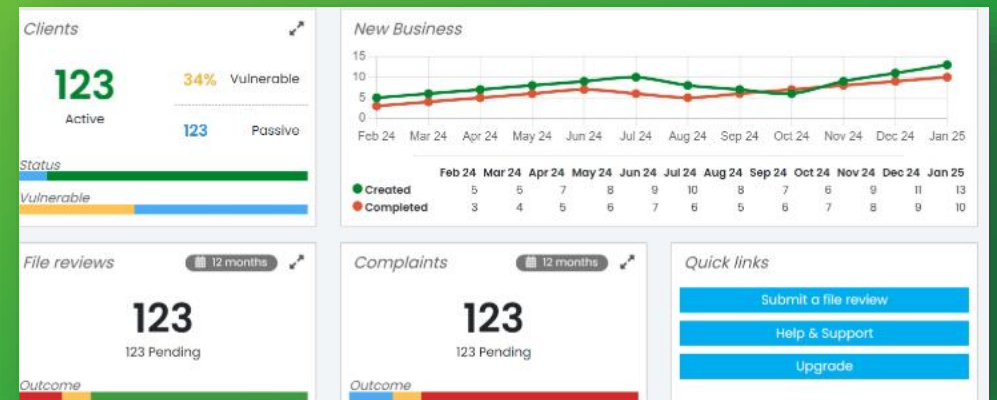
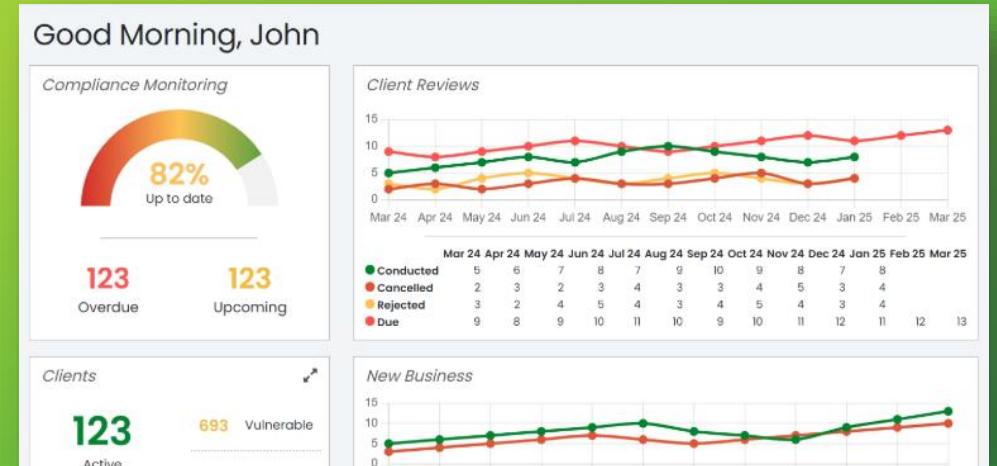


Personalised dashboards



Track key risks

Staged rollout from April – talk to us about priority access





# Business support

Improve performance, increase value

- Flexible support from inception to exit
- Access to industry leading event programme



## Professional development

Training & CPD      Regulatory based training      Learning Platform

Meet regulatory requirements, develop staff



## Proposition development

Mortgage & protection      Investment solutions      Referrals & partnerships

Serve more clients, more effectively



## Growth & exit services

Acquisition Services      Increase your reach      Exit planning

Create value, realise value



# MyLearning

'Our bespoke learning platform, combining the best of Competent Adviser & our own in-depth knowledge of financial services'

**+ NOW Includes new partner content!**



## NEW content



Crypto



Markets



Cash



Care



Soft skills



Retirement

*\*\*Essential still only £5pcm, or upgrade to plus for an extra £5pcm\*\**



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# Client growth and service – your top priority

## Vouchedfor

FREE universal directory listing & client feedback

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Outsource to specialists

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Keep clients informed

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'93% of consumers influenced by online reviews''

'On average, advisers **unlock £65,000 revenue** opportunities via Elevation client feedback tool'

'**IHT & estate planning** now in top three client conversations'

'Caspian received over **2,000 referrals** from members'

'**69%** of advisers say the autumn budget has changed client conversations'

'**66%** of advisers want to increase client communications'



# NEW Business Lifecycle Support

## Exit planning

- Readiness assessment
- Preparation
- Take to market



## Value building

- Strategic review
- 12-month programme
- Build enterprise value



## Aquisition

- Prepare to acquire
- Match with sellers
- Access funding options





# Dedicated contact and engagement

To ensure you can capitalise on all of these new initiatives and maximise your membership...



Dedicated point of contact within Adviser Services



Best practice forums



Focus groups



Events

'The services you have said will help you to **better utilise your membership**'



simplybiz 

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