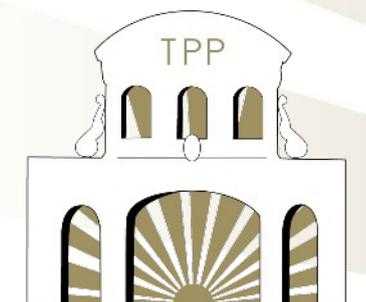


Unleashing Your Potential

Temple Paraplanning

Working with Sense Network



Temple Paraplanning

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The Benefits Of Outsourcing

There are many benefits to having a dedicated team of professionals to handle the lengthy process of administration and research that is a necessary part of wealth management.



Integration of your business with the Sense Network

Reduction of non-remunerative tasks

Minimise chasing phone calls

Security of RDR compliance

Dedicated professional support

Giving you freedom to spend more time in front of your customer

Why Choose Temple Paraplanning?

Based in the South of England, Temple Paraplanning is comprised of 8 core team members. The team has a flexible structure enabling it to increase as the service demand fluctuates, ensuring a consistently high standard is always provided.



While the team are constantly improving their knowledge through continuous education, their years of experience prepare them to tackle even the most complicated caseload, empowering you to provide the best service for your customer.

Compliance With Sense Network

Compliance is at the heart of our Paraplanning. As it is an ever changing entity, we work directly with Sense Network to ensure our work conforms to all industry standards.

Our professional approach can be seen throughout, working exclusively with Sense, understanding their processes and requirements for complete reports

Helping you develop and
grow your business

Temple Paraplanning Services

Each Adviser has their preferred way of working; therefore there are a number of options to fit around you, providing high quality, compliant reports.

To speak to a member of the team the office is open during normal business hours (9-5, Monday - Friday). Alternatively there is a central email address ensuring your request or case is dealt with promptly all year round.

As the team work together on each case you can be confident in receiving the best advice every time.

With each option the major advantage is that the contractual service is provided on a 'Pay as you earn' basis, therefore eliminating the fixed costs associated with Value Added Services. This relates to initial commission/fees and not trail income or ongoing adviser charges.

No Minimum Fee
No Retainer

Temple Gold

10%*

The only requirement from you is a fully completed Fact Find and details of what you would like to happen based on the clients' objectives.

The Paraplanner is responsible for:

- Obtaining policy information
- Research, illustration/KFD
- Providing application suitability letter
- Addendum requirements
- Scanning and attaching documents
- Policy & commission/fee tracking
- Providing a Temple Gold Annual Report

The Adviser is responsible for:

- Mortgage sourcing
- Obtaining letter of authority from the client
- Complete & attach the Fact Find
- Service proposition & investment strategy
- Anti money-laundering requirements
- Ensure the application is signed
- Fee agreement (when applicable)
- Switch/replacement form (when applicable)

*This relates to initial commission/fees and not trail income or ongoing adviser charges.

Temple Gold Annual Report

One of the key benefits of the Temple Gold service option is that our Paraplanning team will compile all the information and prepare a customised annual report ready to present to your client.

It can also include your company logo and contact details, providing a professional point of reference for your client.

This report can be either printed, bound and sent to you in preparation for your customer meeting or emailed across ready for you to finalise.

Please contact our team at least 10 working days before your appointment to request the annual report.



Temple Silver

9%*

Temple Silver Service allows you to keep hold of client administration while having the security and support of a professional Paraplanning team.

The Paraplanner is responsible for:

- Research, illustration/KFD
- Providing application suitability letter

The Adviser is responsible for:

- Obtaining policy information
- Addendum requirements
- Scanning and attaching documents
- Policy & commission/fee tracking
- Mortgage sourcing
- Obtaining letter of authority from the client
- Complete & attach the Fact Find
- Service proposition & investment strategy
- Anti money-laundering requirements
- Ensure the application is signed
- Fee agreement (when applicable)
- Switch/replacement form (when applicable)

*This relates to initial commission/fees and not trail income or ongoing adviser charges.

Temple Bronze 8%*

If you prefer to stay in control but need a helping hand with the security of compliance and file checking, choose between Option 1 or Option 2.

The Paraplanner is responsible for:

Option 1:

- Research, illustration/KFD

Option 2:

- Providing application suitability letter

The Adviser is responsible for:

- Obtaining policy information
- Addendum requirements
- Scanning and attaching documents
- Policy & commission/fee tracking
- Mortgage sourcing
- Obtaining letter of authority from the client
- Complete & attach the Fact Find
- Service proposition & investment strategy
- Anti money-laundering requirements
- Ensure the application is signed
- Fee agreement (when applicable)
- Switch/replacement form (when applicable)
- Research, illustration/KFD or Providing application suitability letter (depending on Option taken)

*This relates to initial commission/fees and not trail income or ongoing adviser charges.

Testimonials

Temple Paraplanners have proved to be an invaluable resource for our customers across the UK, here are just a few of their comments...

“ Outsourcing our Paraplanning to Temple Paraplanning has had an extremely positive impact to our business. Their work is of a consistently high standard, and it has enabled us to concentrate on our core business and clients, which has a dramatic effect on our business growth.

They took time to understand our business and tailored their approach, to their work, to suit us. I would highly recommend them. ”

Andrew Harrington - Harrington Robertson Ltd

“ Temple has provided my Paraplanning support since June 2012. This has helped me to concentrate on building my business. The Quality of Paraplanning support is excellent and they offer fair value for money.

I would recommend without hesitation to other firms ”

Simon Lipscombe - Sanctuary Wealth Planning

Testimonials

“ I’ve been using Temple Paraplanning for over two years now and I find the people, processes and professionalism genuinely outstanding.

In simple terms, whatever I need help on, from making a complex client recommendation down to basic administration or best practice, I know I can rely on Temple to give me considered , quality support throughout. ”

Matthew Bell - Bell Financial Management

“ I started with the Sense Network in the Summer of 2015 and as most will know, each company or network have their own specific compliance standards. Each time I have changed company or network it can be difficult to adapt to those specific standards without guidance.

I have since taken on the services provided at Temple who have helped significantly with the whole process in increasing my compliance and overall quality of report writing.

Sarah and the team are always on hand to help whenever required. ”

Richard Clayton - Old Royle Ltd

Join us to unleash your potential

With the support of professional and experienced Paraplanners working behind the scene on your behalf, you have the freedom to grow your business by being in front of your customers when they need you.

Knowing that we only get paid when you get paid means that there will be no unexpected monthly expenses and that we are all working towards the same goal...

Valued & Loyal Customers

Unsure which Service Plan works best for you?

Contact Sarah, our Head of Paraplanning and Operations Director, to talk through your requirements in detail:

Sarah Geraghty

Tel: 01329 282882

Email: info@templepp.co.uk

Web: www.templeparaplanning.co.uk

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