FOR PROFESSIONAL USE ONLY

OFFER MORE SERVICES.
BUILD WEALTH MANAGEMENT.
ENHANCE YOUR VALUE.

CHANGING OUR PARTNERS' LIVES FOR THE BETTER

CONTINUUM
YOUR FINANCIAL FUTURE MADE REAL

2020 INNOVATION

Contents

Introduction

Continuum is an Independent financial advisory business and brand created for the modern era.

A fresh and modern business that is a recognised leader in the financial advisory sector and aims to be viewed by clients, advisers, our people, our strategic partners and the regulator as the quality benchmark others should aspire to.

Today, the business sits within the top 1% of financial advisory businesses as a result of our approach to delivering a complete service offering to our clients. Our unique culture is one of high quality, hand-picked, Independent Financial Advisers collaborating across the UK.

As one of the first firms to receive the ESGmark kitemark, we recognise that times are changing and the importance of being business leaders in this regard.

By setting new standards of service, client engagement and client satisfaction, whilst thinking about wellbeing and impacts on the environment around us, our clients and our people, continue to thrive in the everchanging landscape.

Earn More. Be Valued. Grow Capital.

Continuum Wealth Management Offering

Continuum is a modern financial advice business that can offer solutions across a range of areas for you and your clients:

- **Wealth Management:** We offer a complete Wealth Management service including Investment portfolios and Retirement Strategies. Tax efficiency is a key part of this service to ensure no unnecessary tax is paid on any investments at outset, during investment or on decumulation. We work with your clients to assess their risk attitude and then design bespoke solutions to meet their objectives.

- **Cash management service:** Whether reviewing business or personal cash, our cash management service ensures that clients accounts are working as hard as possible. Typically, business and personal accounts with high street banks offer well below the leading rates on offer from other institutions whilst still offering FSCS protection.

- **Corporate & Individual Life Insurance:** Making sure that you, your family, your staff and your clients have financial provisions in case the worst happens. This ensures that you have peace of mind that monies will be available to the right people at the right time. With tax efficient offerings also available, our advisers will design solutions to meet your needs, with the costs usually being far less than expected.

- **Mortgages:** Whether buying a first home, moving, re-mortgaging or working with buy to lets, our dedicated advisers are able to offer independent Mortgage advice to meet your needs.

- **Equity Release:** As property prices continue to grow, our home becomes one of our most valuable assets. However, the ability to extract capital or an income against the value of your property is becoming increasingly popular to give money today, as well as potentially reducing the value of your estate and in turn your inheritance tax bill.

- **Succession and Estate Planning:** We work with our clients to make sure that family wealth passes to the intended parties as tax efficiently and smoothly as possible.

- **Long Term Care:** As clients need more assistance in their latter years, we can assist in planning in advance and during this difficult and vulnerable life stage.

Marketing our Partnership

Helping you to offer a Wealth service

At Continuum, we have developed a marketing programme bringing Wealth Management to your clients' attention in a simple and easy way:

- **Website Marketing:** The addition of a dedicated Wealth Management page is simple and easy to do. We have ready to use templates for your own web developers to add the extra service.

- **Monthly Marketing Programme:** We create professional advertorials for you to send on to your clients through your chosen CRM tool. These are dual branded and compliance checked so that you can highlight each month the extra services that our Wealth Management service can offer.

- **Videos:** As a progression from the above programme, we are also now producing high quality short videos to enhance your business and our Wealth Management service.

- **Client Education Programme:** We raise consumer awareness of financial planning needs through our Client Education Programme. Content is extended across digital channels to grow knowledge and brand awareness as the Trusted Adviser of choice.

- **Personalised Weekly Client Communication:** Through our central support process, our advisers are able to deliver bespoke and personalised weekly communication, that is created to engage clients further as part of a market leading client proposition.

- **Brand Loyalty programme:** We further reward our clients through our Brand Loyalty Programme, designed to provide additional benefits and grow client advocacy. This valuable benefit is recognised by our advisers as a unique enhancement to their service offering.

- **Delivering on Client Outcomes:** Through constant review of our marketing and client engagement, we have created one of the most comprehensive offerings in our sector. This is measured by constant client feedback through Net Promoter Scores and Google reviews.

"We believe that every client must be in a better position as a result of any interaction with a Continuum adviser"

Nathan Stacey IFA at Continuum

Strategic Partnerships

Joint Planning to deliver Wealth Management to your Clients every day

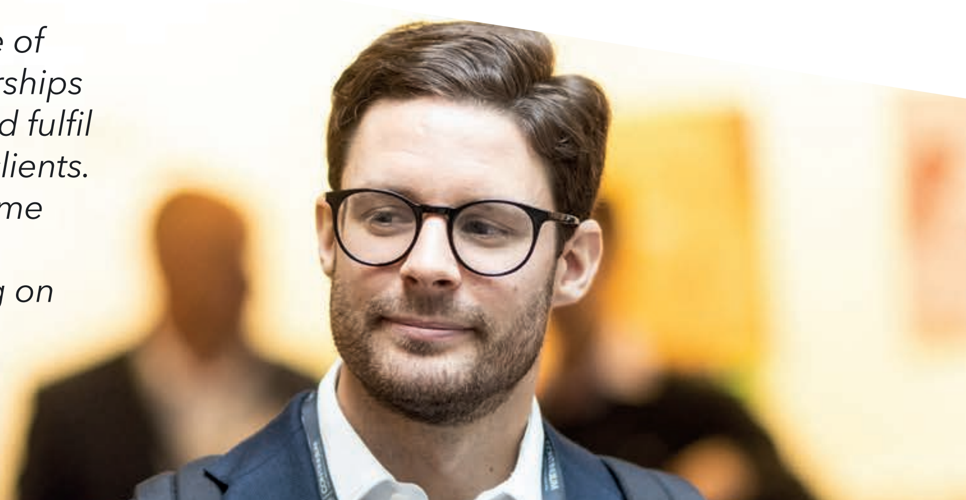
We work closely with accountancy partners to embed our partnerships, ensuring that everyone in your business is aware of Continuum's services.

We also have knowledge and experience in embedding our partnerships to identify and introduce Wealth Management client opportunities. This includes the following:

- **Business Planning:** From outset, we will work jointly with you on a business plan which we will regularly review to ensure the success of our partnership.
- **Introduction Process:** We are aware of the best ways to introduce clients to ensure that we gain positive engagement, so that we can assess their needs and deliver solutions to satisfy your clients' requirements.
- **Marketing:** As covered on the previous page, we have a proven marketing strategy that makes your clients aware of the Continuum wealth partnership and what additional benefits this delivers.
- **Training:** Primarily focused on client facing team members, we offer short, simple, client focused training designed to identify client opportunities and how best to introduce these to our advisers.
- **Contact Management Strategy:** As part of business planning, we will agree our contact management strategy with you and your business to ensure that our partnership is constantly reviewed and we are making changes as appropriate to drive success.

"Our knowledge and experience of developing accountancy partnerships helps us to meet, understand and fulfil the needs of their accountancy clients. This then delivers a passive income stream for those accountants to benefit from without them taking on the advice risk."

Chris Long IFA at Continuum



Additional Client Services

Changing our Clients' Lives for the Better

As a modern advisory business, we have developed an enhanced client offering making best use of technology to deliver not just ongoing advice, but a client experience where the feedback is consistently high.

- **Financial Portal:** Clients have access to all aspects of their financial plans through our integrated technology platform. This offers secure messaging, document storage and regular insights as well as up to date valuations of your entire financial world, not just your investments. This enhances client/adviser relationships and drives shared ownership of future planning needs.

- **Loyalty Programme:** We have partnered with one of the global leader's in reward programmes to deliver our loyalty scheme which on average saves each individual member £1,100 per annum.

- **Client Education Programme:** Delivered through social media and a weekly e-newsletter keeping our clients updated on world events and hints and tips on financial matters to help educate, inform and build deeper trust between you, as their adviser, and your clients.

- **Well-Being Programme:** Our programme helps support our clients and our staff well-being, and is key to enjoying a satisfying, balanced and prosperous life.

"Continuum continue to give me sound and helpful advice. The personal service they give is second to none. My financial advisor is incredibly knowledgeable, and we engage really well, which establishes a good relationship, between us. I would 100% recommend Continuum to any prospective clients."

Alison Clarke, a Continuum client

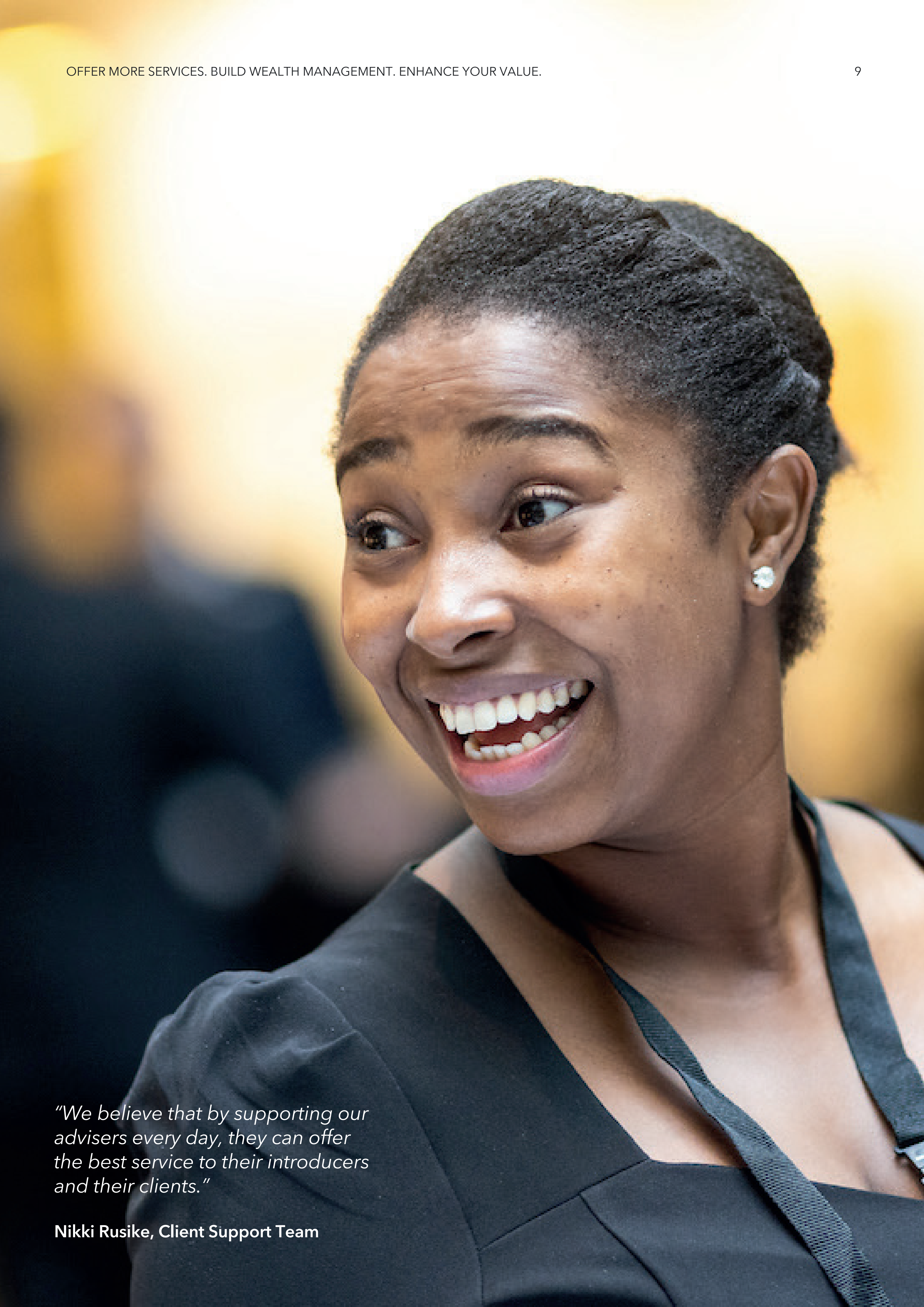
In partnership with you every step of the way to success

Continuum has hand selected every adviser and member of our support team to help you to grow our Wealth partnership as we share success and value every day.

We help you grow your business and your value:

- **Onboarding:** We have a clear onboarding process to ensure you are fully up and running to introduce clients with confidence. We share knowledge and support you through the initial phases of the partnership.
- **Dedicated Contact Point:** We partner your business with one of our hand-picked advisers to give you a daily contact point who can fulfil your client's needs.
- **Client tagging:** All your introduced clients are tagged so that any income in respect of these clients will continue for the life of our partnership.
- **Regular fee reporting and payment:** We ensure that all incoming payments are reconciled daily to ensure swift onward payment. We then deliver accurate and regular fee/commission statements with client details and payments in respect of your clients.
- **Training support:** We ensure that you are aware of our complete offering and how best to present this offering to your clients.
- **Marketing:** Helping you to market our partnership to your end clients through various channels, including social media, using various medium. Our multi-million client reach and expertise will help you to enhance this service to your clients.
- **Management Information:** We offer specific MI on clients leads, applications and completions to monitor, understand and adjust process to ensure our partnership opportunity is maximised.

Our team are all focused on making it easy for you and your clients to do business with us.



"We believe that by supporting our advisers every day, they can offer the best service to their introducers and their clients."

Nikki Rusike, Client Support Team

Please get in touch

Join us on our journey

With our absolute focus on high quality client delivery through our national network of advisers, Continuum has moved into the top 1% of financial services providers.

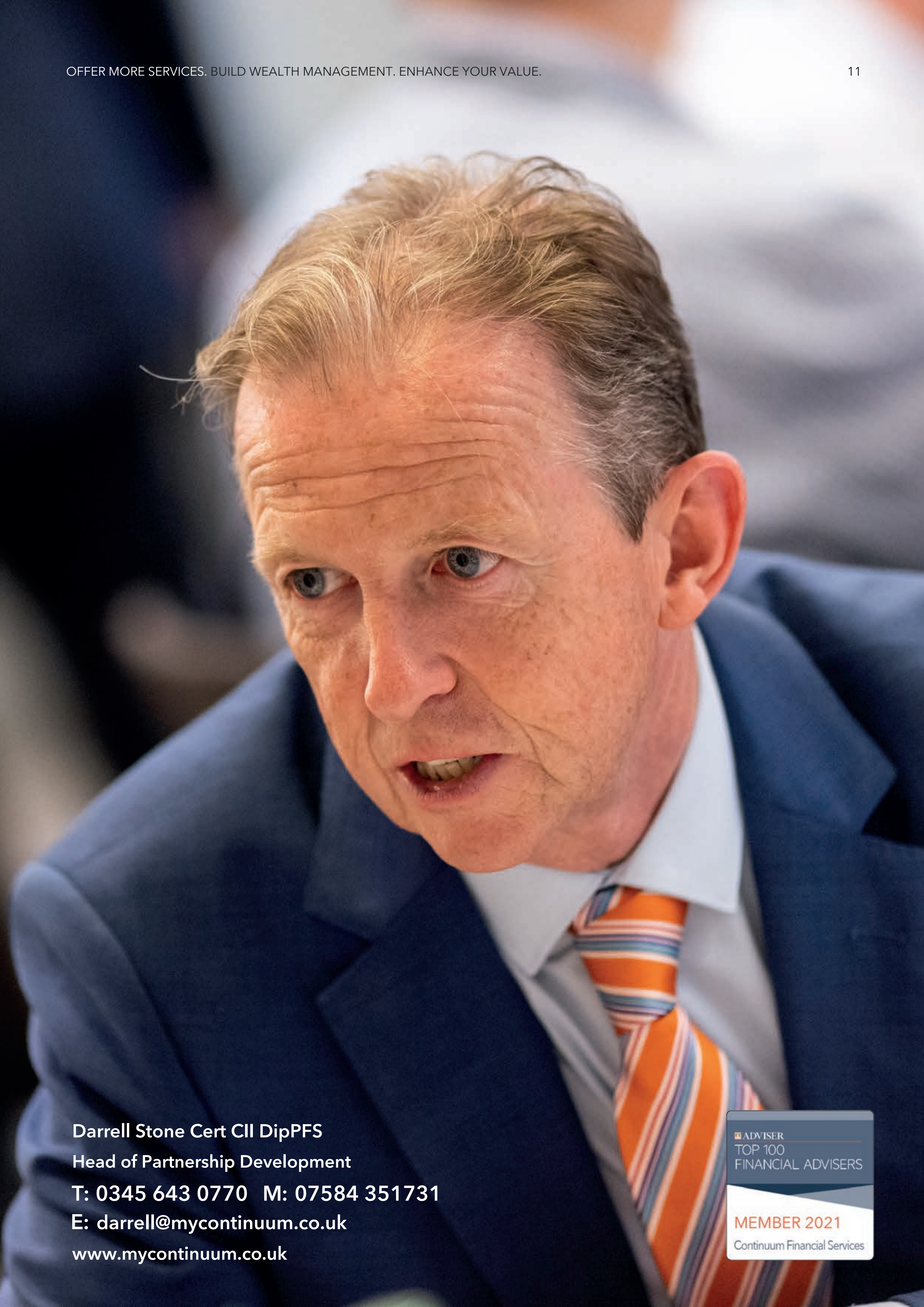
Our modern, independent advice offering has value to our clients and introducers and allows our advisers to grow their business quickly, compliantly and professionally.

With a competitive client charging structure, full client offering plus optimal state of the art technology, Continuum has become a leading brand in the Wealth Management industry.

Please take that first step and talk to us today to find out more

Important information

Your home may be repossessed if you do not keep up repayments on your mortgage. You may have to pay an early repayment charge to your existing lender if you re-mortgage. A Lifetime mortgage is a loan secured against your home. To understand the features and risks, ask for a personalised illustration. Equity release will reduce the value of your estate and may affect your entitlement to means tested benefits. The Financial Conduct Authority does not regulate taxation and trust advice or will writing. When investing your capital is at risk.



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