# Recruitment Brochure

**Helping advisers maximise their potential.**

Ablestoke Financial Planning
A Quilter partner


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# A bit about us

Based in the City of London, Ablestoke is a forward-thinking wealth management company dedicated to helping people secure their financial futures. Our team combines deep industry expertise with a client-first approach, delivering tailored advice, investment solutions, and long-term planning. Together, we bring decades of experience across finance, technology, and customer care to make wealth management accessible, transparent, and impactful.

Ablestoke has built a reputation as a trusted adviser for thousands of clients across the UK. Our commitment to providing personalised financial advice and our client-focused approach sets us apart in the financial services industry.

Founded in 2009 Ablestoke is dedicated to providing high quality and value for money financial planning advice for our clients.

Since our inception, Ablestoke has grown from a small advisory firm to a leading financial planning partnership. Our growth has been driven by our dedication to understanding our clients' needs and providing tailored solutions that deliver results.

# How we help advisers like you

## Our aim is to help you RUN, GROW and EXIT.

i.e.

- Run - profitably
- Grow - sustainably
- And when the time comes, EXIT confidently.

## This is not to say that you are not doing this already, or your plans are not in good shape.

### Run

We feel that there are economies of scale to benefit from, and our belief is that advisers in our sector are stronger together.

### Grow

Treating clients as individuals is key, and so we want to work with you in the same professional manner, to help you get more of the right type of client. We want to embrace your individuality, while providing frameworks within which you can flourish.

### Exit

Just as you help your clients plan for retirement irrespective of their current age, we will help you with your own planning. So, you can feel confident that your clients are looked after, and you enjoy the rewards you have worked hard for.

**Run** profitably → **Grow** sustainably → **Exit** confidently

# Where are you in your adviser journey?

Irrespective of where you are in your career, we know we have the tailored support to help people like you.

We pride ourselves on treating all our advisers as individuals. That said, we could not help but notice there were similarities between certain groups or adviser at different stages of their career...

| Adviser stage | Typical descriptions | Support they valued the most |
|---|---|---|
| Growing | Hungry for technical and personal development, they value career plans. They seek ways to grow their business and get more of the right type of client. Retirement and exit seems a long way off, but they respect the fact that they need to start with 'the end in mind'. Often happy to do more of the end to end process / tasks to ensure they initially learn their craft, but also want technology and support to reduce human error. | Marketing, training and development, mentoring, lead generation support |
| Maturing | They have good numbers of clients but want more of the right type of client. Now considering how to take their business to the next level. Often too busy to take time out to work on their business. Want to delegate administration and non-client facing work in the main. Retirement still seems a long way off, but they often suffer from not planning to maximise this opportunity until too late. | Administration support, focused marketing, business planning, peer group referrals, support to become specialists or more highly qualified |
| Realising | Retirement is approaching but they are unclear how to ensure their clients are looked after. They want to release the value they have built up either personally or in their business, but are concerned they may not get true market value. They have a loyal core number of clients and large 'data banks' of previous clients. | Releasing their liability, succession planning, practice buy out schemes, phased retirement, high quality personal support. |

**Which ones resonate the most with you?**

# Our adviser focused solutions

We listened to our advisers and built a proposition that could be tailored to each of them, depending where there are on their own 'journey.'

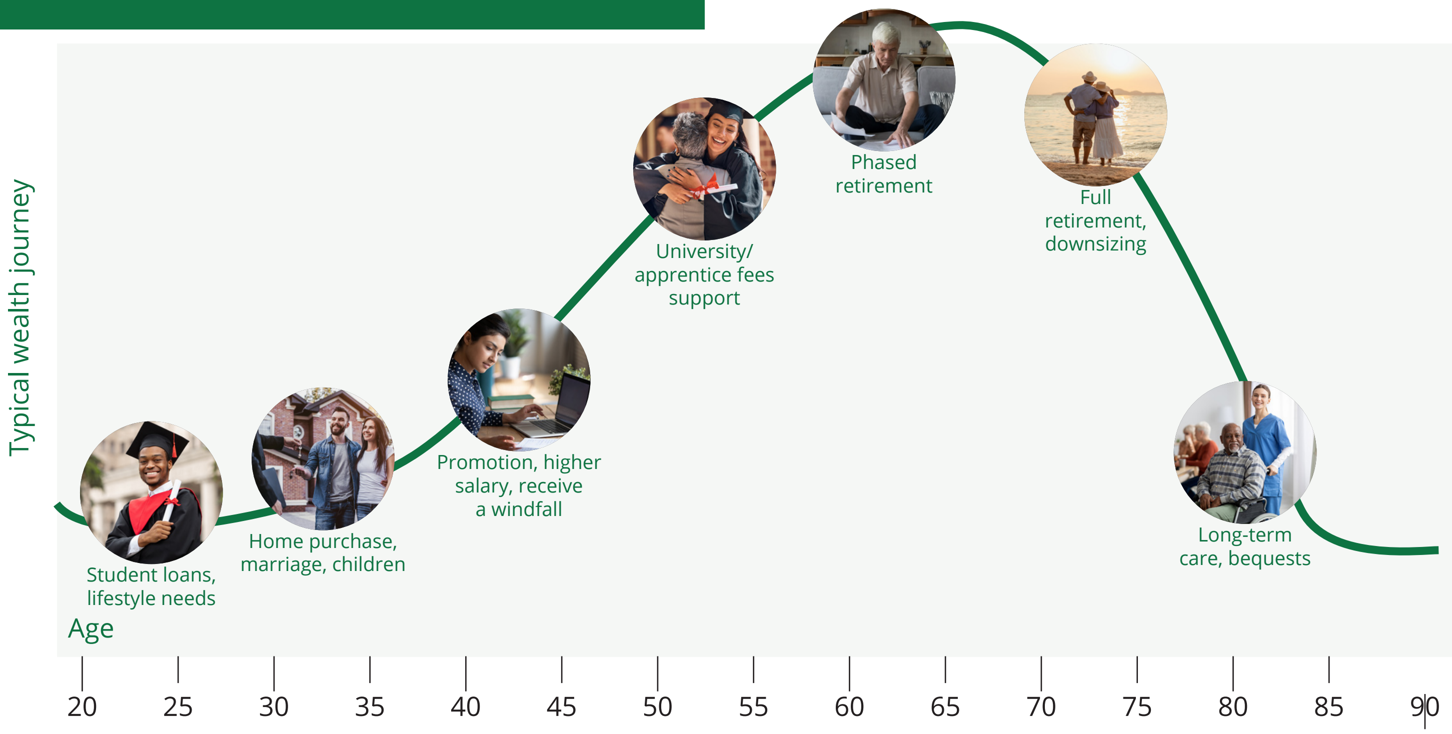
## They told us the key topics were:

- **Liability**
  Protection for you and your clients now and in the future
- **Proposition**
  Maintaining your offering and evolving it where required
- **Marketing**
  Retaining and attracting more of the right type of client
- **Support**
  Having the right people to do the right jobs at the right time
- **Community**
  A group of like-minded people to share ideas and clients with
- **Servicing**
  Processes to deliver your promises more profitably
- **Learning and development**
  Modules, workshops and meetings to help you achieve more in your career (e.g. Financial Advisory School, and our Future Leaders Programme)
- **Technology**
  Enhancing the client experience and saving time
- **Security**
  Financial peace of mind in the knowledge we are backed by a FTSE 250 company
- **Reward and remuneration**
  Contracts that reflect the level of support you require
- **Longevity**
  Defined career and progression plans across all age ranges and experience
- **Retirement**
  Confidence that your clients are looked after in the same spirit as yourself when you choose to retire

## Have we missed anything else that you need?

## What are your top 3 priorities?

# Our client focused solutions




## The stages where our business helps clients

**Wealth preservation**
Estate planning, succession planning, trusts, key business person

**Retirement planning**
Pension funds, personal funds, company or trustee funds

**Personal and business protection**
Life cover, critical illness cover, income protection cover, business cover

**Wealth management**
Savings, investments, tax planning, retirement planning

**Cash management**
Savings accounts, emergency funds, financial planning

## Areas we can advise you on:

### Protecting wealth
Protecting you and your family's standard of living against the unexpected.

### Creating wealth
Ensuring you maximise your standard of living for when you do not want to work so hard.

### Managing wealth
Making the most of tax-efficient investment opportunities so that money is available when you want to spend it.

### Property wealth
Ensuring suitable arrangements for your home, second home, buy-to-let or commercial properties (commercial properties are by referral only).

### Business wealth
Helping small and medium-sized enterprises to grow and become more profitable.

### Retaining wealth
Retaining more of your hard-earned money legally and ethically.

### Preserving wealth
Preserving the value of your estate for your loved ones.

## Where will you specialise?

# The marketplace we review on the client's behalf

## We provide Restricted Financial Advice

The financial world can be extremely complex.

Analysing and monitoring the enormous diversity of products, funds, wrappers and platforms is time consuming and costly – a cost that ultimately finds its way to the end consumer.

Having worked with a wide range of clients in all areas of financial planning, it became clear that using a tailored range of handpicked solutions could help with this.

Together with some of the most modern and efficient products available, this has proven to be the best way to cater for many of our clients' financial needs.

So, by restricting our advice service to a carefully chosen range of products and providers, we are able to remove that complexity and therefore keep costs low, and focus on providing great service.

Furthermore, if an occasion ever arises where we are unable to meet any specific need you might have via our chosen providers, you are able to search the broader market for an appropriate solution.

We believe this approach offers our clients the best of both worlds: a first-class range of providers and products designed to meet the vast majority of their needs at a reduced cost, with the capability to look more widely should the need arise.

The analysis is carried out centrally at Quilter to ensure the offer is of the highest quality, and that it remains up-to-date and appropriate to meet your needs both now and in the future.

# Your 'on boarding' process to join us...

### 1. Listen

We want to understand what you are looking to achieve and how we might work together. We will explore what we can expect from each other, and what concerns or barriers may stop us being a success together.

### 2. Plan

This is where we explore how you will trade, how you get paid, and the right level of support. We agree a plan and ensure accountability on both sides to ensure a smooth transition. We also agreed the terms of our relationship.

### 3. Implement

This starts with the application process, referencing and due diligence. This is followed by an induction event, and a plan to ensure competent adviser status is achieved as pragmatically as possible. We agree regular milestone review points to ensure accountability and a smooth transition.

### 4. Review

At least every 3, 6, 9, 12 months, we formally check progress, and refine and enhance support where required. This helps ensure that our relationship is managed in line with expectations. It also gives a forum for suggestions and improvements to be captured and acted upon by all.

## Summary

- We feel that we are the 'place to be' for an adviser.
- We provide the right level of support tailored to you – often driven by where you are on your 'adviser journey'
- We have built a successful business based on helping our clients improve their lifestyle – we feel we do the same for advisers.
- We are growing, and hope you may also be part of that continued journey.

### We are focused on helping you

- Run - profitably
- Grow - sustainably
- Exit – confidently when the time is right

**Run** profitably → **Grow** sustainably → **Exit** confidently

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