

TABLE 2: SCALEABLE ADVISER VALUE PROPOSITION

Office	Advisers are trained in how to set up meetings at your office	High
Admin Support	Administrators chase clients and paperwork and manage client relationship (reviews etc)	High
Lead Generation	Business co-ordinates marketing and lead generation, supplying a flow of leads to advisers	High
Paraplanning	All advice written in centralised paraplanning team	High
Business Brand	Business can create a brand because there is a 'house approach' to advice	High
Review Service	A formal review service is managed by admin team: advisers just see clients	High
Training/skills development	All advisers are trained and upskilled: learning is shared regularly across advisers	High
Financial advice process	All advice prepared in the 'house' way: consistency	High
Technology	Business invests in common technology	High
Investment Process	Business researches and creates a common investment process	High
Platforms	The same platform is used across the business	High
Pricing	Business sets the price of advice (with its advisers)	High
Buy-out	A pre-agreed buy-out model exists for advisers leaving (for whatever reason)	High