

Sanlam Partnerships

THE BENEFITS OF PARTNERING WITH US

Sanlam partners share a similar culture and ambition

Sanlam Partnerships works closely with you, our partners, by offering full support including compliance, marketing and the expertise of a large financial services firm. In addition to that, funding is available to allow businesses to grow, acquire other businesses or even buy-out existing advisers and shareholders. We respect the independence of our partners and you can continue to work under your own brand name, whilst having the autonomy and flexibility to manage your own business, recruitment and growth.

Our objectives are simple

- Help enable our member and partner firms to provide excellent outcomes to their clients
- We support both an independent and a restricted proposition
- We will ALWAYS put your clients' needs first
- Our business model is fair and transparent, with fixed monthly fees

Partners are

- Fiercely client centric and client orientated
- Ambitious to grow their practices
- Keen to build longevity and sustainability
- Have an annual turnover in excess of £500k
- Offer advice in all areas of financial planning
- Recognised within their community as a quality business
- Happy to follow a uniform client proposition

Partners benefit from

- Support to grow their business to the agreed scale (typically > £2m turnover)
- Access to capital for acquisitions (internal and external)
- Recruitment and development resource
- Regional exclusivity
- Marketing, research and paraplanning support
- IT, HR, finance and legal support
- Access to fund manager teams
- Support in arranging and executing regional client events
- Income paid direct

Next steps

If you would like to find out more about this service, please use the contact details below

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