ROYAL LONDON

CHAMPIONING BEST PRACTICE

When it comes to preparing for your client reviews, wouldn't it be great to have a support service that saves you time, is quick and easy to use and helps to keep you on track with your compliance requirements?

We've looked at the current review process and the work involved. And we've taken into account what the Financial Conduct Authority (FCA) believes is 'best practice'. We've built our Review Service with all this in mind. It's designed to take the pain out of your client reviews and help you demonstrate best practice.

THE FACTS

What the FCA says about best practice	How our Review Service can support you
Have access to support tools, services and material to complete your client reviews.	Carry out your client reviews in just a few easy steps while helping with your compliance requirements.
Show your client a breakdown of your services and charges in a way they'll understand.	Produce clear information about your ongoing services, including a breakdown of charges in pounds and pence.
Understand your client's circumstances and retirement savings objectives.	Identify where your client needs to make changes to meet their retirement goals.
Offer a personal service and become someone your client can trust.	Produce personalised client reports which showcase the work you've put in.
Use bold text, colour and/or highlighting to draw out key information.	Show your client's key information using colourful graphics and jargon free language.
Demonstrate that you know your client.	Spend more time and energy on review conversations, allowing you to focus on what really matters to your client.

Source: FCA Thematic Review. Retail investment advice: Adviser charging and services, December 2014.

HELPING YOU
KEEP ON TRACK

Here's a quick glance at the reports our Review Service can produce. Our service aims to help you keep on track with your compliance requirements and demonstrate that you're providing a professional service.

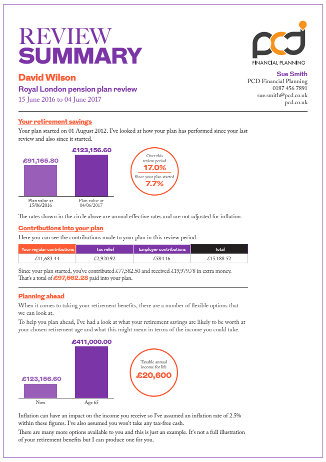
For your client

Full client report

Create a personalised report that showcases the work you've put in.

Use colourful graphs and jargon free language to display your client's plan performance.

Explain your professional fees and the plan charges in a way your client will understand.



Client summary

The one page summary shows a snapshot of your client's plan and includes the key points from the full report.

For you

Detailed report

Our Review Service will automatically pull through a detailed report just for you, backing up all the facts and figures in the client report.

What next?

Speak to your usual Royal London Sales contact for more information and a demonstration of our Review Service.

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