



Active Financial Partners Ltd

A supportive, dynamic company for
Wealth Managers and Financial Planners



**Are you looking for
a company that will
help you to grow
your business?**

**We are that
company.**

Who are we?

Active Financial Partners Ltd (AFP) is a company that works with Financial Planners and Wealth Managers throughout the UK.

We provide a complete compliance and technology support service to self-employed financial advisers.

AFP is a subsidiary, wholly owned by Compass Wealth Management Group PLC, one of the largest wealth management firms in the South of England. Compass has been providing private and corporate wealth management solutions since 2001.

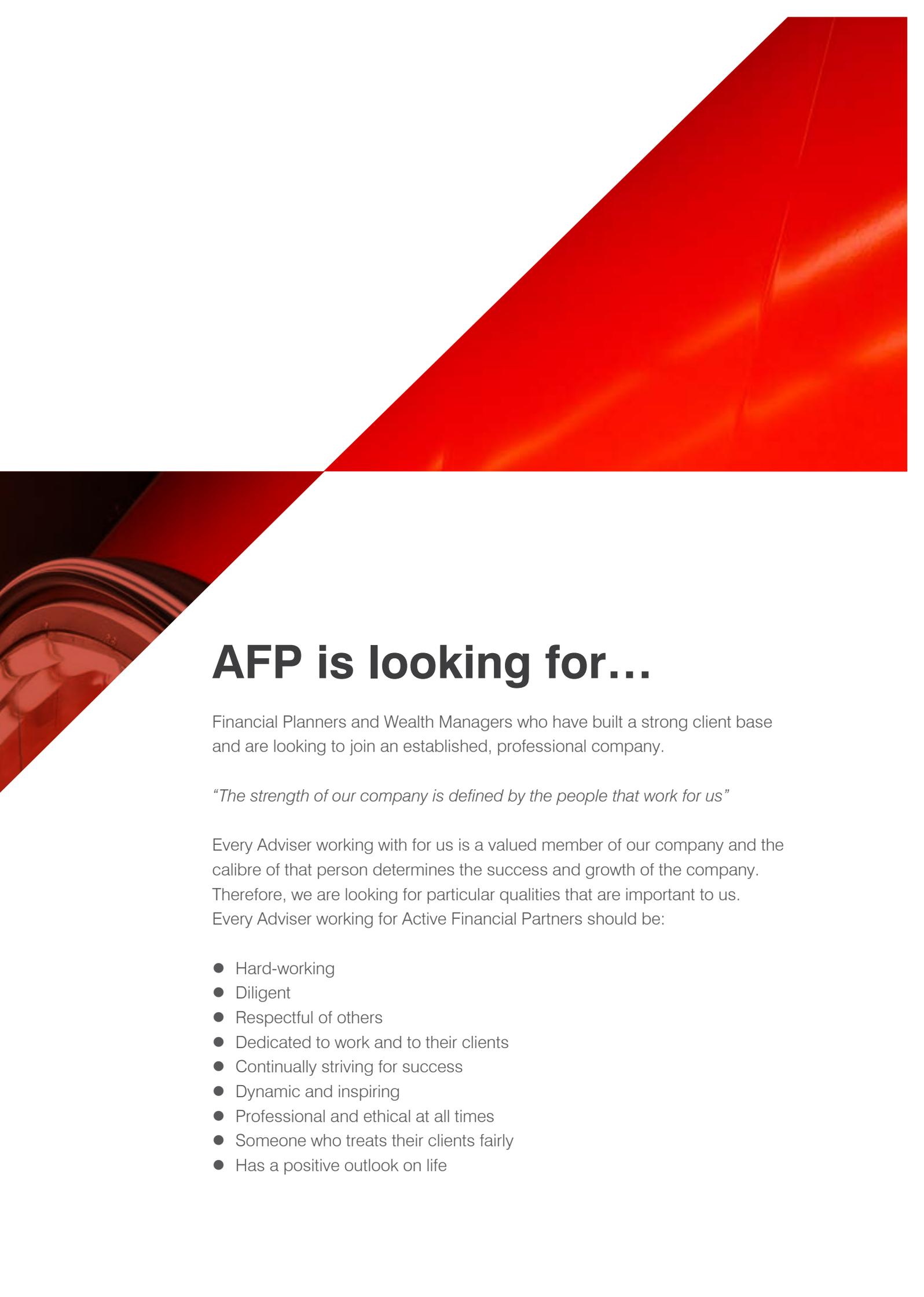
AFP is authorised and regulated by the Financial Conduct Authority.



As the Operations Manager I facilitate the merger of new advisers into AFP. I act as a liaison to ensure all client data is successfully transferred to us; I train the new advisers on our system so they are able to service their clients requirements as soon as they are authorised, offering continued support throughout their time with AFP.

Susan Swan





AFP is looking for...

Financial Planners and Wealth Managers who have built a strong client base and are looking to join an established, professional company.

“The strength of our company is defined by the people that work for us”

Every Adviser working with for us is a valued member of our company and the calibre of that person determines the success and growth of the company. Therefore, we are looking for particular qualities that are important to us. Every Adviser working for Active Financial Partners should be:

- Hard-working
- Diligent
- Respectful of others
- Dedicated to work and to their clients
- Continually striving for success
- Dynamic and inspiring
- Professional and ethical at all times
- Someone who treats their clients fairly
- Has a positive outlook on life



Our commitment to you

A rewarding working relationship is a two way process.

If you have the required qualifications and qualities that we are looking for, then we commit to provide the following services and back-up to make your life easier.

Technology

- Latest technology
- On-line leading back office technology
- Research software
- Market leading technical support
- Electronic business submission
- Electronic new business register and e-policy tracking
- On-line valuations
- 24/7 full online access to your clients

Compliance | Legalities

- Real-time compliance on-line
- Professional indemnity
- No more RMAR/GABRIEL
- Authorisation usually within 3 weeks

Training | Support | Supervision

- Training and development programme
- Technology training and support
- Transitional support
- Exit/succession plan provided
- National adviser forums / seminars
- Centralised supervision

Financial

- Weekly fee payments
- Top retention rates
- No additional regulatory costs
- No membership or joining fee
- Lifetime renewal/trail fees paid

Identity | Integrity

- Trade under your own name/brand
- Or use AFP branding / marketing
- No locums required
- Central Para Planning Service
- **You own your clients 100%**

What makes us different?

AFP Ltd has been around for over 14 years. We have a strong balance sheet, a great team that works for us.

Eight reasons to join our company

- 1** You will receive at least 80% of your client fees.
- 2** We are a stable, secure company - our proven track record is testament to efficient and careful leadership and planning.
- 3** We will provide you with all the support and back-up that you need to run your own successful business.
- 4** You will not pay a joining fee.
- 5** You will not pay a monthly fee to work with AFP.
- 6** We are a dynamic and friendly company, who encourage and develop the people who work with us.
- 7** We are at the end of the phone – easily contactable, approachable and helpful.
- 8** We are amongst the top 100 financial services companies in the UK.



When I was looking for which company to use I found Active Financial Partners to be the perfect balance of support and freedom. I was very impressed from my first discussion with the Directors through to meeting the staff and investment team, but I knew the real proof would be in the day to day running of my business. I have found the technology a real benefit, I can check most aspect of my business online from real time valuations and the online document store through to a full payment history and expected payments due which has allowed me to spend more time on what is important- my clients. The real icing on the cake has been the IMS proposition, the managed portfolio service which has freed up again more time for me to spend on planning for my clients whilst they deal with the fund selection and rebalancing. I would not hesitate to recommend them to anybody.

Paul Ford



And finally...

I chose Active as they offered the correct fit for me, I was able to speak to a director with answers.

Most companies promise service and support but few deliver, speak to any adviser, Active have delivered on all levels. I came from a tied background so I had a steep learning curve, the help given, on a one to one level, or via media was excellent, it is not possible at this stage of learning to progress without the back up, support and experience of colleagues who understand your problems and worries and what you are going through. The systems are straight forward and easy to use, Active offer an investment proposition from real people, tailored to the needs of clients, fees are paid quickly and never with a struggle (which all advisers love). Questions and correspondence are dealt with swiftly and you build relationships and trust with colleagues throughout the business. I would recommend and do recommend Active.

I have stayed with Active because they have delivered on their promises, and are there when I need them but let me get on with providing solutions for my clients.

Walter Lashbrook

We want to work with people like you.

See how we can support you

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Arrange a call back

NOTE: Best works with Outlook, Gmail and Yahoo

Name*:

Email:

Telephone*:

Day*:

Time*:

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**Active
Financial
Partners**

