



Investment Case Study...

IFA Client C contacted Precision Paraplanning for assistance with an investment case:-
A review of existing Investment Bonds and ISAs to identify whether the clients objective of consolidating holdings and improving growth potential and tax efficiency was achievable and best advice.

What Precision Paraplanning did?

After requesting the initial fact find, case notes and debrief, we were able to provide within 5 working days;

- Full research on existing plans, including tax calculations to provide adequate justification for an investment switch
- Defaqto research filter report for most suitable platform based on advisers criteria and chosen model portfolio
- Personalised Illustration , KIIDs and KFDs for file
- A fully compliant Suitability Report using the Precision Paraplanning template

What was the benefit?



Total adviser income = £2400 fee and 0.5% ongoing adviser charging

Total paid to Precision Paraplanning = £300
(a tax deductible business expense)

Total hours saved by the adviser = 6 hours *

* Time to spend generating additional business, meeting with clients and honouring existing service agreements

Take the first step towards a more profitable
business, contact us today

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