Quilter Financial Advisers

Corporate Affinity Partners

Partnering with corporates to empower their employees with meaningful financial education.

As a business we understand that financial freedom and security for most people starts with education. The adage of 'you don't know what you don't know' couldn't be more relevant, and for most people across the UK this rings true for their personal financial wellbeing.

To effectively address this gap, Quilter Financial Advisers have packaged a suite of financial education modules and meaningful content which we deliver out to corporate partners.

In addition, we offer access to an initial complimentary financial consultation with a qualified financial adviser.

Building on years of experience in the affinity market

We are currently trusted and retained by 20+ partner organisations across the UK. We offer members of these affinities a financial wellbeing service, empowering them to make appropriate financial planning decisions via the provision of financial education, supported by access to tailored financial advice.

In 2021 we launched an expansion of this service offering into the corporate market. Our ongoing service offering covers six different areas. In addition, each of our corporate partners has access to a dedicated relationship manager, who will not only support in the creation of a launch plan but will also support in the delivery of the ongoing services.

Continued overleaf

Services offered across six different areas

1. Educational articles

These are designed to improve employees understanding of the various financial wellbeing components and are usually issued monthly and included in a corporate newsletter. We can produce articles covering a wide range of generic topics such as:

- The stages of your financial life
- How can I reduce my inheritance tax bill?
- What could I do with my pension tax-free cash?
- Cash ISA's could be shrinking your savings
- Online money education for your children

2. Online engagement portal

Employees will have access to a dedicated and private online portal where they can request a free initial financial consultation with a qualified financial adviser. The portal will also provide other relevant information to further empower them to make positive financial decisions e.g.

- Guides
- Factsheets
- Calculators
- Best buys

3. Events

These are offered to corporate partners and employees who can sign up to attend a wide array of events on topics such as.

- Pre-retirement
- Redundancy
- General financial planning
- Mortgages
- Equity release
- Workplace pension schemes

These events are either delivered on-site or via webinar.

4. Free initial consultation

We're here to support employees with financial advice they can trust, helping secure their financial future. Our experienced advisers are here to provide whatever they need, every step of the way.

Employees are given an opportunity to have an initial exploratory discussion on topics which include.

Pensions – Do they know whether their pension will give them a comfortable retirement. Are they getting the right tax relief on contributions and maximising the income they'll receive?

Investments – It goes without saying that we all want our money to work as hard as it can for us. Whether we've built up savings over time, or maybe received an inheritance, it's important that our money is given the best opportunity to grow.

Mortgages – A mortgage is likely to be the biggest financial commitment we make. Because the impact of having the right or wrong mortgage can affect us for many years, the advice of an expert professional can be particularly valuable.

Protection – Protection products can provide the peace of mind that our family will be looked after financially should we fall ill or be unable to work.

5. Quick facts & triage

All advice enquiries are submitted by an employee via a dedicated telephone number or online form which is managed by our central team.

Enquiries are tracked and booked into the adviser's diary for a 'Quick Facts' meeting to be carried out. Once complete, an advice consultation is arranged for the adviser and employee to further discuss the various advice requirements.

6. Tracking & monitoring

All advice enquiries are tracked and monitored by our central team. A quarterly report detailing events, attendance numbers and enquiries will be provided through to the corporate partner.

Who are Quilter Financial Advisers?

We are part of Quilter plc, one of the leading providers of advice, investments, and wealth management both in the UK and internationally, managing over £100 billion of investments on behalf of over 900,000 customers.

Your need for financial advice and planning lasts a lifetime, and it's our job to be there for you. We can build an understanding of your needs and support you every step of the way. All your needs are covered from the first time you want to start saving for the future to planning for your ideal retirement.

PDF/Quilter21_0096/July 2021