aps Legal & Associates

PART OF THE SIMPLYBIZ GROUP

Specialist Estate Planning & Will Writing for Financial Advisers

The Choice of Professionals

"We make Specialist Estate Planning and Will Writing **simple, cost effective and profitable** for your business"

"APS Legal & Associates is part of the SimplyBiz Group offering high quality training in Wills, estate planning and probate/estate administration. We offer high quality technical support in order for you to seamlessly deliver these important legal services to your clients."

SIMPLYBIZ GROUP

SimplyBiz have over 6000 Independent Financial Advisers and are the fastest growing FCA compliance service Company in the UK

Ken Davy - Chairman
SimplyBiz Group

Join us today and watch your financial services business grow

www.aps-legal-professional.co.uk

APS Legal & Associates

APS Legal & Associates

Our business model is built around you; the Professional Financial Adviser.

We train hundreds of IFAs a year, allowing you to offer Will Writing and Estate Planning directly to your clients. As well as our professional service and integrity which is recognised so widely in the financial services sector, the value for money which we offer to our qualified Associates is incomparable. This in turn allows each and every one of you the opportunity to provide a much needed service to all of your clients, but also to provide your financial services business with the increased income and profits you deserve.

We believe the cornerstone of all financial planning is in having the correct Trusts & Wills in place for clients. The opportunities available to all IFAs who offer this service are extraordinary. Providing a specialist Estate Planning and Will Writing service to your clients not only brings in additional regular income, but also allows you access to prospective future clients in the form of executors, witnesses, guardians and trustees named in the initial Will – don't forget that these contacts could lead to additional business for not only your Estate Planning firm but also your IFA practice.

It's normally pretty easy to think of reasons for not changing how we do things or for not trying something new. With hindsight one realises that this mindset can be a real danger to making progress. Look at this from another perspective; have you ever kicked yourself for not picking up on something new when others have?

IFAs can get ahead of the game by using good ideas and that possibility is now available to advisers with the service provided by APS Legal & Associates. Over 1000 IFAs have been trained by APS Legal & Associates and soon being an Estate and Financial Planning adviser is likely to become the norm. **Why not become an early adopter of an idea of its time and which your clients desperately need?**

The idea of being able to cross old professional lines and offer joined-up advice for the legal and financial aspects of Estate Planning makes perfect sense. It is entirely consistent with a financial adviser's inter-personal skills and professional competencies and consistent with TCF and the aspirations of the FSA in wanting advisers to get closer to their clients. It also makes business sense.

Whatever clients' wealth may be, they need to feel they are doing their best for those they love, to feel in control and to have peace of mind. Almost universally that is far from where they are. Why? Because no one is telling them about the threats their families and their wealth are facing. That's why financial advisers have an obligation to help and, if they don't, there is a risk of much of their good advice being unstitched on a client's death. **Here lies the opportunity.**

So tick these boxes

Q. Is this difficult?
A. No, all you need is the desire to help your clients.

Q. Can you increase your profits?
A. Yes, in the short and long term.

Q. Will it help your financial services business?
A. Yes, across all aspects of it.

Q. Is this just about Wills?
A. No, there's a range of services and products to offer.

Q. Will it help re-position your business?
A. Yes! You can talk to new people about new things.

Q. Will it change how you do business?
A. Not fundamentally but client relationships will deepen.

Q. Is this likely to increase the sale value of your financial services business?
A. Yes!

Q. Is this something to be done now and in retirement?
A. Yes, you can develop a post retirement business ahead of time.

So don't miss out on this great opportunity to get ahead of the game. Why not attend an APS Legal & Associates 3 day training course and become a qualified Associate?

aps Legal & Associates

Option 1

Diversify your business operations and **become a qualified Estate Planning Associate** and substantially increase your income and further client opportunities

You can provide our services directly to your clients and we will happily develop and support you and/or your staff to become fully qualified Associates. We will put you through our **exclusively designed IFA 3 day training course** where you will receive an industry recognised qualification. We will provide all the ongoing support required for you to provide a complete Estate Planning service to your clients. There is a one off fee to train and become a qualified Associate.

This will include amongst others the following:

- The knowledge, skills and confidence to provide comprehensive advice and take client instructions
- A full 3 day training course to include examination and refreshments
- The professional production of Wills, Trusts and other associated legal documents
- A complete 'back office' function, including reception, secretarial and administration support
- The use of the company's corporate identity
- Membership and accreditation to both our membership bodies. Provision of a practicing certificate and the right to use their logos on stationery and advertising material.
- Full lifetime professional indemnity insurance (to £2.5 million) and public liability insurance (to £1 million), providing you operate within the conditions of the Associate agreement.
- Ongoing legal, technical and mentor support
- Internet based information service, The Associate Information Centre (AIC) **www.aps-aic.co.uk**
- Ongoing CPD (Continuing Professional Development)
- Continuation training provided on a regular basis
- Residual income

Qualify in just 3 DAYS!

We produce all the legal work for you

All legal documentation productions costs are charged at 35% inc of VAT of our suggested retail prices, giving you 65% profit for your business, without incurring the hassle of paperwork and compliance issues.

"I recently attended the APS Legal & Associates consultant course. I've booked my first appointments and had my first referrals. I'd recommend the course to any adviser who needs or would like more work. It's a great excuse to go back and see your clients."

Alan Blackwell IFA
Shawcross-Blackwell Financial Advisers

A business model that works!

As an Associate of APS Legal & Associates you can realise your full potential and benefit from the opportunities available by offering specialist Estate Planning and Will Writing in your financial services business. **All of your clients need Wills - go beyond the fact find!**

Associate opportunities from week one =

Further access to new clients for your financial services business including executors, witnesses, trustees and guardians named in your clients' Wills and other associated legal documents.

T: 0845 430 4600

For further information please contact Scarlett Musson at s.musson@aps-legal.co.uk

Book your 3 day training course today.
Courses around the UK throughout the year

CASE STUDY EXAMPLE

Week 1:

Client 1:	**Protective Property Trust package**		
	RRP	=	£550.00
	APS legal doc fees	=	£192.50
	Associate profit	=	£357.50
Client 2:	**Mirror Wills + 2 LPAs**		
	RRP	=	£650.00
	APS doc fees	=	£227.50
	Associate profit	=	£422.50
Client 3:	**FLIT package**		
	RRP	=	£795.00
	APS doc fees	=	£278.25
	Associate profit	=	£516.75

ASSOCIATE TOTAL PROFIT FOR WEEK 1 = £1296.75

Visit www.aps-legal-professional.co.uk

Option 2 Referrals

"Working closely with financial advisers has shown that our unique business model offers not only the vital link for enhanced Client relationships and future generations of Clients but also a robust income stream for advisory businesses through estate planning and estate administration."

Scarlett Musson
Business Development Director - APS Legal & Associates

If you choose not to go down the Associate route, but still wish to provide this vital service to your clients, simply pass on all your Will Writing and Estate Planning enquiries to us at our Head Office through the dedicated phone number that we provide. We would then provide basic advice over the phone and put your clients in contact with our local professional and independently qualified Associate, who would arrange a **free no obligation consultation** in the comfort of your client's own home. Alternatively we can introduce you directly to our independently qualified Associates within your area in order to develop viable and beneficial relationships between both parties.

APS Legal & Associates is one of the most recognised and trusted brands in the specialist Will Writing and Estate Planning profession. With over 150 independently qualified Associates and members of staff across the country, our approach in a traditionally fragmented industry has allowed us to build a strong brand name with rapidly increasing recognition.

Our strength in the marketplace combined with our structured operations and resources not only allow us to build national relationships, but we also pride ourselves on building relationships in local areas with IFAs. Our company is national by structure, but local by nature and our resources allow us to have a professional and qualified legal consultant in every part of the UK, to service all areas. Our qualified consultants are handpicked, so you can be safe in the knowledge that your clients will get a professional and courteous service. The key to our success in the local market, is also in our ability to generate further referrals for the introducing IFA, building long term relationships, so the IFA not only benefits from monthly commission payments and residual income, but also the possibility of new clients introduced to them by our consultants.

As an introducer to our business, from fees charged to clients you will receive the following percentages.

- Introducers will earn 15% for all referred cases for Wills, Trusts and other associated Legal documents and 17.5% for Probate and Estate Administration cases.

"We at Leebrook Independent Financial Advisers Ltd have been accessing the services offered by APS Legal & Associates since 2006. During this time their professionalism and operations within the marketplace are the best we have come across.

The quality, efficiency and legal knowledge of their staff and Consultants is exceptional which not only allows us the confidence in knowing that our clients are receiving the highest quality of service, but that our business is also benefiting from providing this service, courtesy of the association."

Leebrook Independent Financial Advisers Ltd.
Directors: Garry Drabble & David Cunliffe

"I have been using APS Legal & Associates for about 3 months to write wills for my clients, in particular I have built up an excellent relationship with one of their legal consultants, David Ross. The service they offer is both comprehensive and prompt.

I have passed them a number of cases, some with complex needs utilising wills, trusts and powers of attorney. They pay full attention to all my instructions and keep me fully informed of progress and any queries which may arise. I would highly recommend their service to other SimplyBiz members."

Paul Beard Independent Financial Adviser Ltd
Director: Paul Beard

For further information on the simple way of joining APS Legal & Associates please contact:
Scarlett Musson (Associate Business Manager)
at APS Legal & Associates on **0845 430 4600**
or email: **s.musson@aps-legal.co.uk**
or visit **www.aps-legal-professional.co.uk**

PART OF THE SIMPLYBIZ GROUP