Adviser Home

DEVELOPMENT PLATFORM

10 YEARS

Ten years ago we launched Adviser Home as a **development platform** to help advisers run, develop and market their business and help providers engage with advisers to create a vibrant online adviser market place.

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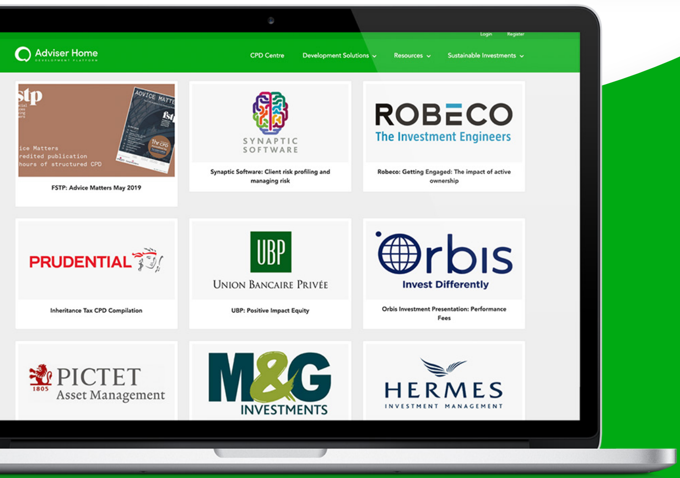
What we do

Today we serve **over 20,000 advisers** and have worked with **over 40 providers** from international mega providers to boutique fund managers and specialists to offer ecomms, events and on site advertising packages tailored to suit

We produce **Adviser Guides** to reflect market themes – in 2021 focusing on Intergen Marketing, Suitability & Sustainability, Multi Assets, Model Portfolio Services and ESG Developments – with support from multiple leading providers



We operate a **CPD centre** where providers can place their learning content. Advisers can view and select educational content, take assessments and download their CPD certificates

We provide a **Weekly Adviser News** Service from *John Lappin* - 10 years continuous flow of news and insight

A **free to access resource centre** including content sourced for advisers to help them during lockdown

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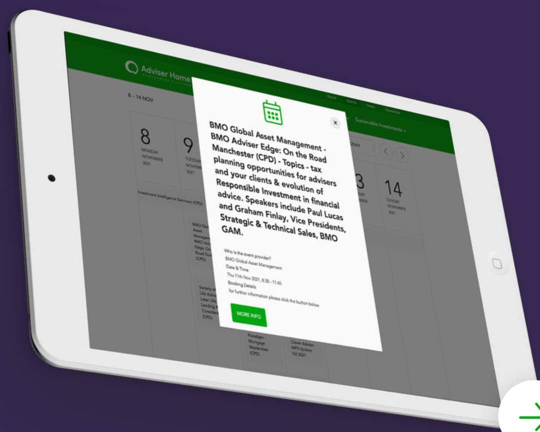
Face to face **events** (*where conditions allow*) and we run webinars for advisers often involving multiple providers and offering CPD

We maintain the independent **Adviser Calendar** – a fully searchable on line tool to help advisers decide which of the 100 plus events they wish to attend. Event providers can simply give us the details and we'll promote the event



We carry out **independent adviser research** amongst our community, generating high quality insightful reports. In 2021 we focused again on the investment market and remote business practices

We have developed and grown a strong presence on **social media** with over 15,000 personal connections – invaluable to reinforce our adviser communication work for provider clients

FCA FINANCIAL CONDUCT AUTHORITY

We often engage with the **regulator** and on FAMR have worked with both the Treasury and the FCA to help them understand the adviser market in depth

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E Comms

A consistent flow of quality material well received by advisers. Since launch in **2011** we have:

Carried out
1,408
e-campaigns

Delivered
19,134,467
emails to advisers

Achieved
3,471,970
opens

Generated total clicks of
438,077

What works best?

Top 10 Email Campaigns

1. **Faith Liversedge**
Your Guide to Business Development in the New Normal
2. **BMO**
A Consumer Guide to Income in Retirement
3. **Just Retirement**
Running a seminar? What could go wrong?
4. **Your copy of the research report**
The Value of Advice
5. **Octopus Live 2018**
Could you be helping more clients save inheritance tax?
6. **Aegon**
Advice Makes Sense - championing the value of your advice
7. **Your free copy of our new report**
Investment Advice 2020
8. **Allianz Risk Matters**
Here's four expert views
9. **Sustainable Investing**
The Adviser Home guide
10. **Prudential**
Making things simpler with Prudential's improved Trust and Application Form Tool

Business ethos

The way we work with Providers

Many providers see us as a **central part** of their marketing and distribution strategy to engage with advisers and work with us year on year. Often they tell us we generate a better response than their own adviser communications. This may be because we can take an independent stance. We issue all our communications from Adviser Home and often make key suggestions as to message and content emphasis based on our long experience in the market and with Adviser Home.

Over the years we have found that advisers respond best if we can offer them content or events which genuinely help them in their work with clients. This can be ideas based, technical or business development. It can be about the investment or protection market or development areas like long term care or equity release. We can help you focus your efforts in a way that makes success more likely and, If we don't think something will work we will say so!

We also run provider events to allow free exchange of ideas on engaging with advisers.

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Who are we?

Our three, hands on, directors *John Enos*, *Andy Kirby* and *Brendan Llewellyn* have combined experience of 110 years with background in advice, provider leadership, marketing, fintech and consultancy.

John Enos

John leads provider client relationships for Adviser Home and has wide experience in distribution and business leadership for leading providers.

Andy Kirby

Andy runs Mint WM and so brings real practitioner experience and insight to our work, and is founder of Money Alive – driving client engagement through video based technology.

Brendan Llewellyn

Brendan is one of the most experienced strategic marketers and has, for 25 years, advised a range of providers on strategy, proposition and brand.

We have a shared commitment to helping providers engage with advisers and we believe that our mix of skills and experience helps make Adviser Home a good long term choice for providers interested in business development.

Find out more

Just contact John Enos

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