

 adviser home

ABOUT US



The Story

Adviser Home was founded in 2011 with a stated purpose to help advisers run, develop and market their business - in the post RDR marketplace.





To achieve this we have a series of **services, free resources, discounts and buying groups** – from PI to cash flow planning, telephony systems, technical tools, business development ideas and marketing content



But the **space** we occupy is **where provider meets adviser** – that crucial interface on which the health of the FS sector depends



So we **partner with financial sector providers** – investment houses, life groups, lenders etc to help them work more effectively with their adviser markets



This involves outbound **communication**, our on line **Development Zones**, our searchable events **calendar**, a flow of **news** and **ideas**



It also involves a commitment to **social media** – creating forums for advisers and training modules aimed at advisers



Our commitment to open dialogue with advisers and professional research programmes helping us develop a unique and practical understanding of the needs of the UK financial adviser: our **What Works campaign** this year was a celebration of advisers own experience of success in their own practice



So the Adviser community has a core of over **12,000 advisers** and support from partnering **providers** from the FS world as well as specialist business services providers



In sustaining our **focus on advisers** and their needs we find ourselves of value to providers who know that their communication via Adviser Home is well received by advisers who are focused on business development

Adviser Needs



Provider
Info



Provider
News



Provider
Ideas



Provider
Education



Engagement



Research



Insight



Events



Business



Services



Discounts



Ideas

How We Work



- ▶ Our core is **www.adviserhome.com** which offers access to our events calendar, resources, adviser offers and our Development Zones where FS providers can showcase their key messages and adviser facing resources
- ▶ We actively communicate with advisers in e-campaigns each week - a news based Monday Bulletin and solus mails to highlight a Partner's message and help drive interest and reaction
- ▶ We build on line conversations with advisers and providers - it's all about engagement
- ▶ We carry out regular research into key industry issues, sense check the market to make sure we are offering the right mix, and provider specific research to allow you to fine tune your proposition or communications
- ▶ Crucially with Adviser Home you will benefit from our refined understanding of how to present your message and content to best effect - we see ourselves as an active part of our provider partners' marketing, we are not simply a passive medium - we are here to help give you a distinctive voice in the adviser market

Who are we?

Our Directors, **John Enos**, **Andy Kirby** and **Brendan Llewellyn** offer combined senior FS sector experience of over 80 years. We have direct experience in financial advice and wealth management, in corporate leadership, in strategy, media, marketing and product. If you partner with Adviser Home you only deal with the Directors

How can we work together?

We offer different partnership options ranging from close involvement in helping you work well with your target advisers through to simply establishing a platform for your communication on **www.adviserhome.com**

The best way we find is to sit down and discuss your business, your needs and priorities and then we will see how we can help and propose a solution for you.

Feedback from provider partners



"We were attracted to working with Adviser Home as the partnership would enable Octopus to engage with a broader network of advisers and help them expand their range of tax planning solutions. Our expectations have been exceeded and we have not only had value with the interaction with linked advisers but also other partners supporting advisers through this platform."

Mike Slater
Octopus Investments



"Adviser Home is a powerful marketing tool for advisers and para planners. It's packed with innovative and effective ideas that can be simply applied to the real world"

Neville Vyas
Director, Head of UK Marketing
Allianz Global Investors



"We started working with Adviser Home nearly a year ago and we have been very pleased with the results so far. Having an independent view to challenge our thinking has helped us communicate more effectively and develop new business."

Ed Carey
Managing Director
City Trustees

Next Steps

Contact **John Enos**
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