PARTNERING WITH ADVISER HOME ON ADVISER GUIDES

INTRO

Over the years our adviser guides have covered: Sustainable Investments, The Inter Gen Opportunity, IHT, VCTs, Business Relief, Ongoing Advice Charges, MPS and the Retirement Market.

These guides are wholly independent in terms of content and style – they are issued as Adviser Home documents – no need for compliance involvement from partner providers (other than for your own quotes/content).

In some cases we create a Guide with a single partner – in others we may have four or more partners. In all cases an important part of the appeal to our provider partners is that Adviser Home take on the work – concept, content, editing and design, and of course, distribution.

For 2026 we have a full programme and we are also open to ideas from providers for other subjects to cover. We are also undertaking adviser research to assess their demand for a range of subjects.

HOW IT WORKS

IN BRIEF THE GUIDES WORK LIKE THIS

PLANNING

BRIEF

We create a brief for you to agree

AUTHOR

We appoint an editor/ author*

EXPERTISE

We contact your agreed subject experts, gain their input and capture quotes and any other content including research, charts etc.

CREDENTIALS

We ask you for a credentials section - ~350 words and to include your contacts for advisers

CONSULTATION

We then seek input from advisers, consultants, commentators with expertise in the relevant area

PRODUCTION

DRAFT

Then we create a full draft (and gain your approval for comments attributed to your company)

DESIGN

Then we involve our design company who will create the right impact and impression for the adviser audience and of course feature your name/ logo on the front cover

DISTRIBUTION

We then move on to distribution and create four solus emails – issued to our full 21,000 adviser community and a further 5 entries to our InfoMix bulletin. We also promote on LinkedIn to our c 15,000 connections.

ACCESS MODEL

Guides are either created on an open market basis or gated where advisers share their contact details in order to access the Guide.

If the guide is gated, the details of advisers who share their contact details to access it are also shared with the partners although this can act to reduce the numbers who actually read the guide which are always higher if there is free access. All guide access is eventually opened up, in agreement with the sponsors, including those that are initially gated so that they continue to work for Partners after the first phase of popularity.

YOUR USE

Once the Guide is produced it would also be open for Partners to use with your own distribution, as support for BDMs, events etc.

OUR GUIDES **PROPOSITION**

Adviser Guides are our core publication. They combine technical briefing with business development ideas, input from sponsors and other experts, and comment from advisers with particular expertise. They are designed as a broad briefing document and a reference source for advisers.

In most cases we offer Guides on a multi partner basis but we also produce some on a sole partner basis.

NEW for 2026

CLIENT FACING GUIDES

Where we are creating an adviser guide we develop a client guide so that advisers have collateral to use directly with their clients and prospective clients. These are written to help clients understand the need and explore the kind of solutions they might expect an adviser to offer.

TARGETED **RESEARCH**

To make sure our guides – both Adviser and Client facing – reflect the latest market views and trends we undertake research with our **21,000 strong adviser community**. For this we create questionnaire, use our on line research platform and offer an incentive to attract participation. This also involves a facility for advisers to give comments and views which we would reflect in the Guides on an unattributed basis.

~21,000

strong adviser community

*EDITORS

In most cases this will be an Adviser Home director – Lisa Best – an acknowledged industry expert on alternative investments/ the tax efficient market. Or Vince Smith-Hughes – a well- known and experienced technical expert from his time with M&G. We can also source from our extensive network of content creators if required.

Lisa Best, Director, tax-efficient solutions, Adviser Home is a financial journalist with a focus on tax-efficient investments. She won the EISA's award for Best EIS Journalist or Advocate in 2022, was a finalist in 2024 and has edited and written multiple guides and insights on Business Relief, SEIS, EIS and VCT.

Vince has been in the financial services profession for over 40 years. He has most recently worked at M&G, but also has experience at AIG, Clerical Medical, Winterthur Life and as an adviser. Vince has vast experience of working in the professional adviser market, using different methods of communication. He has extensive experience of working with sales, technical, regulation, marketing, PR and media.

AS A GUIDE PARTNER
YOU GAIN FROM

- High quality focused content to support your adviser engagement
- All created with minimal provider time and resource – a turn-key approach