



EARN MORE. BE VALUED.
GROW CAPITAL.

CHANGING ADVISER'S LIVES FOR THE BETTER



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Introduction

Continuum is an Independent financial advisory business and brand created for the modern era.

A fresh and modern business that is a recognised leader in the financial advisory sector and aims to be viewed by clients, advisers, our people, our strategic partners and the regulator as the quality benchmark others should aspire to.

Today, the business sits within the top 1% of financial advisory businesses as a result of our approach to delivering a complete service offering to our clients. Our unique culture is one of high quality, hand-picked, Independent Financial Advisers collaborating across the UK.

As one of the first firms to receive the ESGmark kitemark, we recognise that times are changing and the importance of being business leaders in this regard.

By setting new standards of service, client engagement and client satisfaction, whilst thinking about wellbeing and impacts on the environment around us, our clients and our people, continue to thrive in the everchanging landscape.

**Earn More. Be Valued.
Grow Capital.**



The Continuum Partnership

A Culture of Collaboration

Continuum is a business that attracts high quality individuals seeking to deliver outstanding service and client outcomes as part of an everyday culture of excellence.

- **National Modern Partnership:** Continuum is a culture of like-minded Independent Financial Advisers, sharing common values and beliefs to deliver an outstanding client experience at all times. We believe that the sum of the collective is more powerful than a group of individuals working separately. Our advisers work collaboratively in an environment that enables and encourages sharing of skills and experiences to deliver enhanced value to their clients and their business.
- **Modern culture of support and growth:** We are aware that where advisers and staff collaborate, it drives quicker learning and enhanced performance. Our partnership structure delivers several key areas of support that includes centralised paraplanning, administration and marketing that enables our advisers to grow through efficiency and effectiveness. Additionally, our advisers have access to market leading technology that ensures more time working on the needs of clients and more control of their time in the business.
- **Partner Event Programme:** We bring our Partnership together on a regular basis through a programme of support events to develop and grow your individual business.

We encourage collaboration through various formats which include partner forums (face to face & virtual), weekly virtual growth workshops, structured CPD training events, quarterly roadshows, bespoke business consultancy support and National Conference events. These events are in addition to a core structure of working alongside you, as required, to support your business goals.
- **Succession Programme:** Our supportive culture enables Continuum Advisers to achieve market leading business growth that sets them apart from their industry peers. Through this high quality business approach, advisers are also able to achieve capital value through our in house Practice Buy Out Scheme (My Continuum Succession).
- **Governance structure:** Strong governance processes are a standard part of our culture as we deliver high quality service and outcomes to a Continuum client.

Marketing your Business Professionally

Helping you attract and retain Clients

Finding new clients and new business opportunities is always a key driver of growth for any adviser or business.

Continuum has established a singular brand of advice that is easy to access and associated with delivering value to clients and advisers alike.

A Continuum Adviser benefits from:

- **Client Education programme:** We raise consumer awareness of financial planning needs through our Client Education Programme. Content is extended across digital channels to grow knowledge and brand awareness as the Trusted Adviser of choice. Our Award-Winning content is produced weekly and allows a Continuum Adviser to build stronger client relationships and deliver topical messaging to clients effortlessly.
- **Personalised Weekly Client Communication:** Through our central support process, our advisers are able to deliver bespoke and personalised weekly communication that is created to engage clients further as part of a market leading client proposition.
- **Dedicated Marketing Support:** Our in-house marketing team supports our advisers with a varied and extensive suite of collateral designed to raise adviser profile, enhance client experience and support adviser business growth. Through the addition of bespoke content, this award winning department also provides a range of personalised and unique material for our advisers.
- **Brand Loyalty programme:** We further reward our clients through our Brand Loyalty Programme, designed to provide additional benefits and grow client advocacy. This valuable benefit is recognised by our advisers as a unique enhancement to their service offering.
- **Delivering on Client Outcomes:** We recognise the quality of our marketing and client engagement through constantly reviewing client feedback which demonstrates one of the highest offerings in our sector. This is measured by constant client feedback through Net Promoter Scores and Google reviews.

Strategic Partnerships

Delivering high quality new clients every day

Through the Continuum Brand we have secured long term business relationships with strategic partners that offer significant opportunity for real growth, through high quality customers and on line offerings.

- **2020 Innovation:** We are exclusively partnered with 2020 Innovation, the leading accountancy training and development business in the UK, with access to over 5000 accountancy firms. Continuum has been appointed to form Wealth Management Partnerships with their member firms, leading to a constant stream of high quality introductions.
- **Professional Connection market:** We have developed a proven methodology to open, develop and grow successful professional connection partnerships across a range of sectors.
- **Nextjump:** The global leader in developing and delivering employee reward programmes with access to over 5 million employees, across 300 of the largest UK employers. Our partnership delivers daily opportunities for our advisers.
- **Head Office Leads:** Our consistent, high-quality marketing of our Education Programme and Brand development programmes securing daily leads to our Head Office for advisers to engage.
- **Lead Suppliers:** In the lead marketplace, we have developed a strategic partnership with one of the key lead suppliers. This helps deliver discounted leads with consistent profitable returns on investment.

"Since joining Continuum, their partnerships have really helped me build my business. Their knowledge and experience in this area has been essential for my business growth"

Chris Long IFA at Continuum



High Quality Client Offering

As a modern advisory business, we have developed a high-quality client offering making best use of technology to deliver not just ongoing advice, but a client experience where the feedback is consistently high.


- **The Continuum Experience:** We place our clients at the centre of everything we do and aim to provide exceptional service at all times. In doing so, we seek to establish lifetime relationships with our clients, their family and their friends, through a consistent delivery of the Continuum experience. This unique market leading client offering, developed and underpinned through our Partner Charter, has been created to deliver the highest level of brand advocacy.
- **High Quality systems:** We have carefully selected the systems that we use and offer internal training and support to make best use of these systems. We have an in-house help desk for our core operating system to support you at outset and day to day.
- **Financial Portal:** Clients have access to all aspects of their financial plans through our integrated technology platform. This offers secure messaging, document storage and regular insights as well as up to date valuations of your entire financial world, not just your investments. This enhances client/adviser relationships and drives shared ownership of future planning needs.
- **Loyalty programme:** We have partnered with one of the global leaders in reward programmes to deliver our loyalty scheme which on average saves each individual member £1,100 per annum.
- **Client education programme:** Delivered through social media and a weekly e-newsletter keeping our clients updated on world events and hints and tips on financial matters to help educate, inform and build deeper trust between you, as their adviser, and your clients.
- **Cash management service:** Being able to ensure that a client's cash is working as hard as possible enhances client value and improves client outcomes. This area forms part of our standard advice offering and is supported through bespoke systems that capture market updates on an hourly basis.
- **Well-Being Programme:** Our programme helps support our clients and our staff well-being, and is key to enjoying a satisfying, balanced and prosperous life.

Supporting you every step of the way to success

Continuum has hand selected every member of the support team to help you manage and grow your business as your success is our success.

Our team includes the following to help you grow your business and your value:

- **Onboarding:** We have a clear onboarding process that supports full client migration in a seamless and timely manner. This full end-to-end programme enables a fast track transition and uninterrupted new business start.
- **In house Paraplanning team:** Delivering consistently high quality, timely reports.
- **Central Administration Unit:** Assisting you in delivering your service and your reviews to your clients.
- **Partner Growth Workshops :** We deliver a programme of online and face-to-face events designed to support adviser business growth and develop competencies.
- **National Conferences:** Spectacular events with outstanding speakers hosted at locations across the UK.
- **Business Consultancy:** We work closely with our advisers to help them develop their business and achieve their goals.
- **Payments & Reconciliation:** We ensure that all incoming payments are reconciled daily to ensure swift onward payment.
- **Management Information:** We provide all our advisers with monthly, detailed MI that helps you run your business efficiently and effectively.
- **Compliance and Training & Competence support:** Our team ensures that you are always up to date on regulation and make sure that we operate safely.
- **IT Support:** We offer IT Helpdesks for training, support and ongoing guidance on all key operating systems.
- **Marketing:** Helping you to market your business through all channels, including social media, using various medium. Our multi-million customer reach and expertise will help you to enhance your business profile.
- **Professional Connections:** With our exclusive partnership with the largest Accountancy network in the UK, 2020 Innovation, we understand how to work collaboratively. We can assist in finding you partnerships in this network or your local market and drive growth from this area.



Our team are all focused on making it easy for you to do business with us and for your clients to do business with you.

"We believe that by supporting our advisers every day, they can offer the best service to their clients"

Nikki Rusike, Client Support Team

Get in touch

Join us on our journey

With our absolute focus on high quality client delivery through our national network of advisers, Continuum is now positioned as a top 1% financial services company in UK distribution.

Our modern, independent advice offering provides value to our clients and introducers and allows our advisers to grow their business quickly, compliantly and professionally.

With a competitive charging structure, full support team and optimal systems, Continuum has become a leading brand in our industry.

Please take that first step and talk to us today to find out more.





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"Our aim is to change our clients lives for the better, but just as importantly, to change our advisers lives for the better"

Martin Brown, Managing Partner at Continuum

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