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HOW TO GET THE RIGHT FINANCIAL ADVISORS TO YOUR EVENTS

1. WHO DO YOU WANT TO ATTEND?

Who attends an event is just as important as the format and content in ensuring its success.

Whether it is a seminar, workshop, training event or fireside chat, you want to **make sure you have the right people in the room.**

Where is your invitation list coming from?

2. HOW DOES YOUR ORGANISATION WORK?

How it is often done

Too often the only option available is to use:

- Spreadsheets
- Manual lists held by account managers
- Poorly maintained CRM systems
- The people who were invited last time

And without any reference to where they actually live, many invitations are pointless and detract from the relationship you are looking to build.

How it should be done

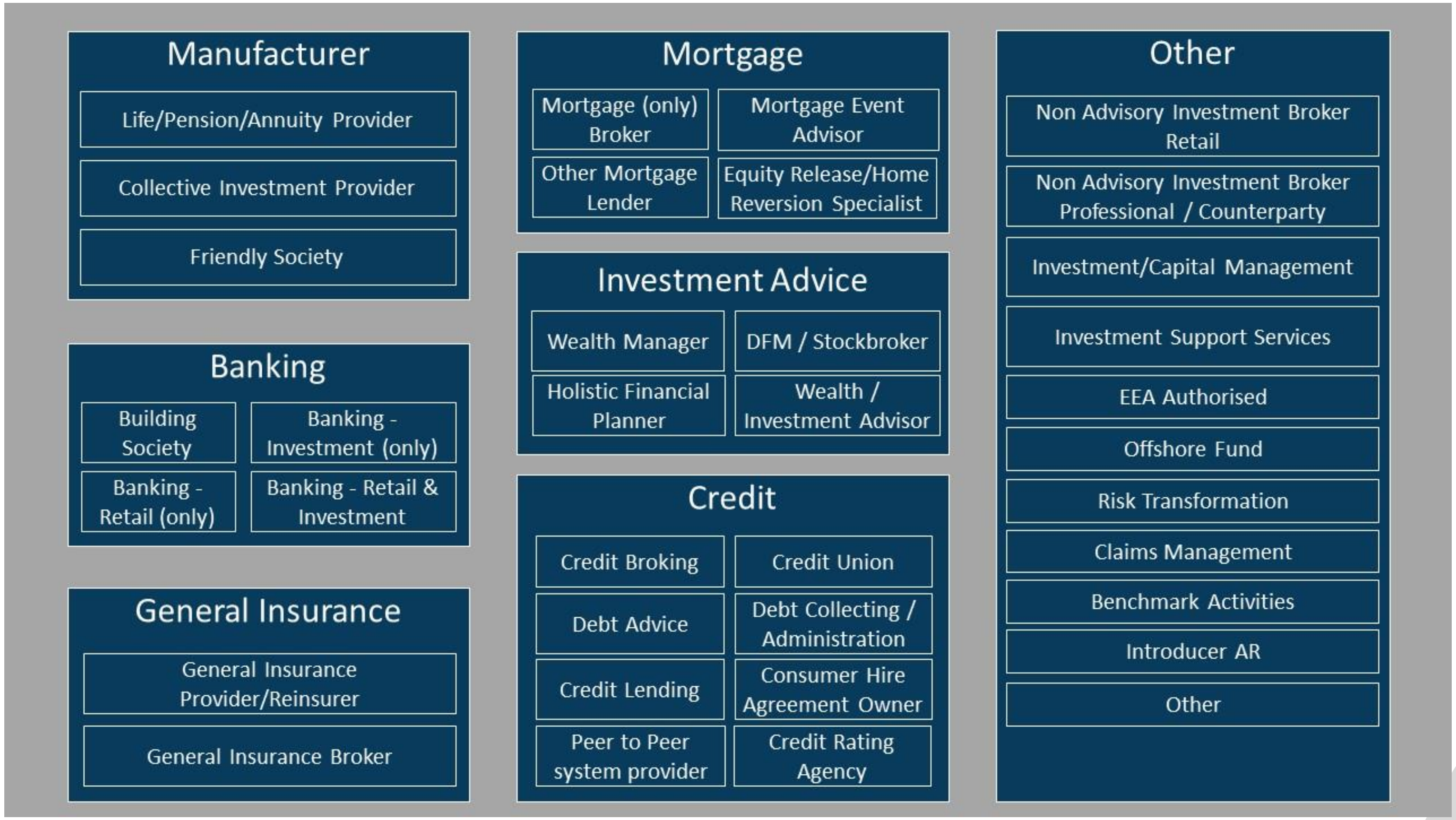
Up to date, accurate information is available to select people based on a range of characteristics, including:

- **The type of firm** they work for (Wealth Manager, Mortgage Brokerage, General Insurance Broker, etc)
- **Their role** (Advisor, Director/Partner, Compliance Officer, etc)
- **Personal proximity** to the venue (not just where their registered office is)

3. Organisation Type

With so many different types of firm now regulated by the FCA are you confident that you have **the right ones available to you**?

Effective segmentation means **less of your resources are wasted** and only the right firms are contacted.



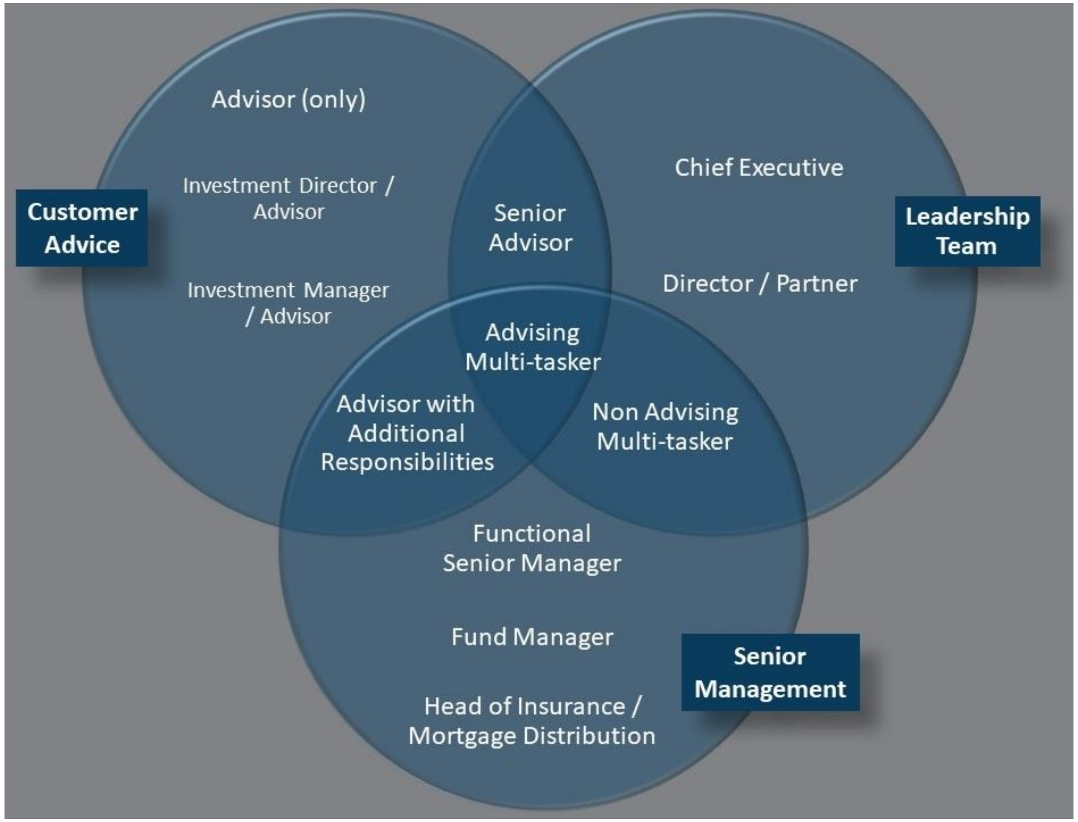
Do you have information on **what the firm actually does**?

4. TYPE OF PERSON

The type of person you invite is just as important as the type of firm.

There is little point inviting:

- **a mortgage advisor to a talk about the future of pensions**
- a compliance officer to a CPD event meant for advisors
- **a non-director to the benefits of selling their business**

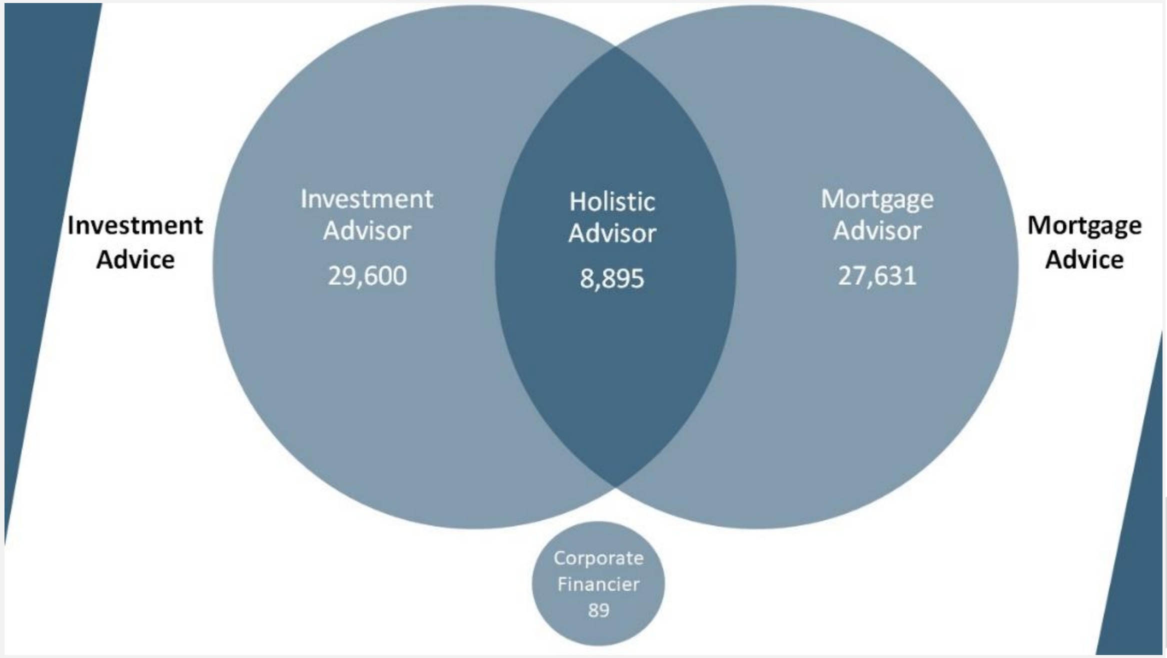


Do you have good intelligence on what each person on the list does?

5. SCOPE OF ADVICE

Sometimes (but quite rarely) someone has put into the data that the person is an advisor. But do they advise on **investments, mortgages or both**? Do they have any other specialisations?

There are **over 60,000 people giving Investment or Mortgage advice** and you really want to contact the right people.



The FCA Directory now enables you to identify:

- Pension Transfer specialists
- People who can manage investments
- Equity Release Advisors
- People who can advise on derivatives
- Long Term Care advisors

And a host of other activities but **do you know what anyone in your data actually does?**

6. ACTUAL LOCATION

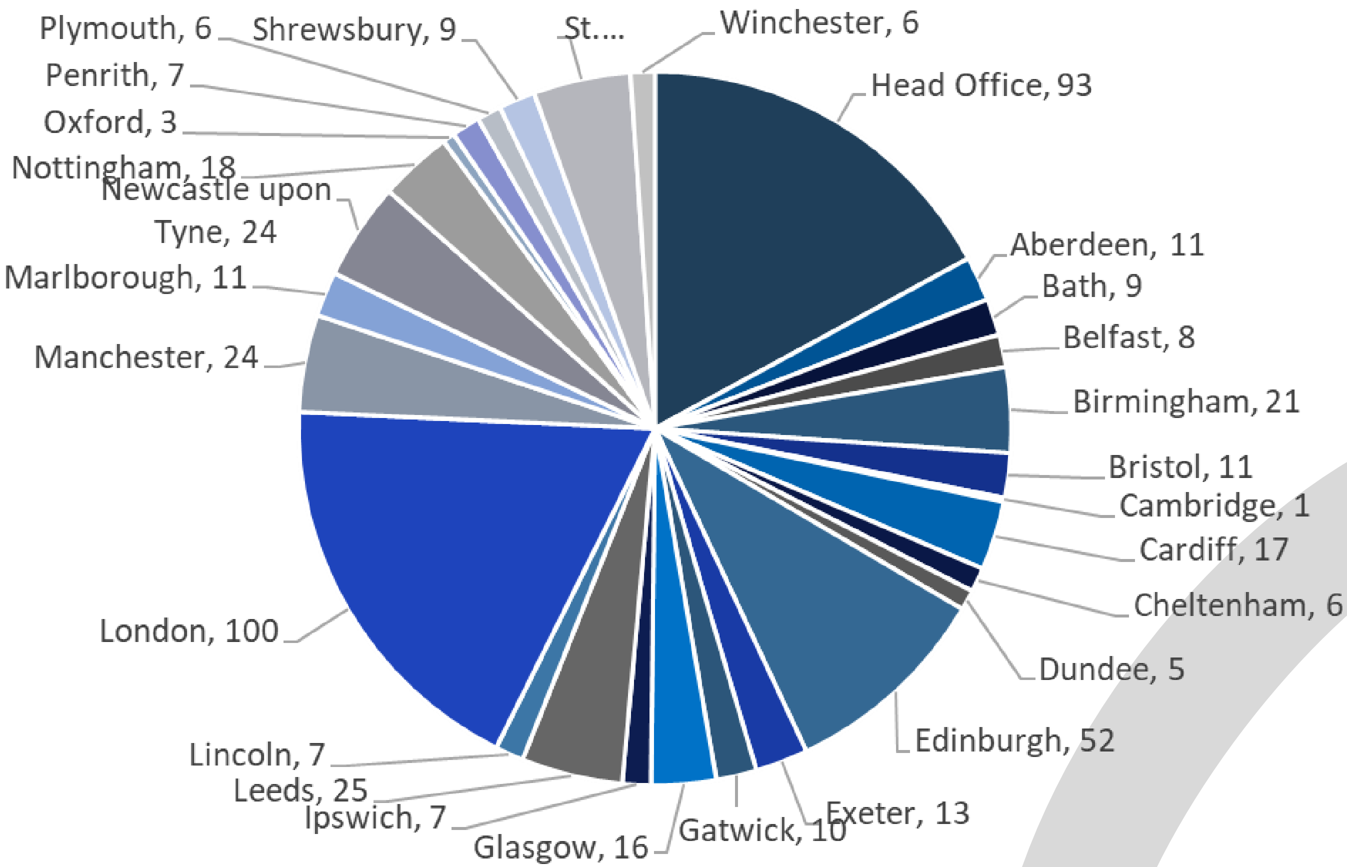
Many firms have a single entry on the Register even when there are regional offices or people work from home.

FCA now records where **people actually work,** but this is only available on the Directory which is only available using **API calls**.

If you are relying on your own data or the FCA Register Extract Service you won't get this essential information.

The image on the right is for a large wealth manager. The Register says they all work in London, this is where they actually are.

Inviting people to the right location will impress them.



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7. HOW FAR DO YOU WANT TO REACH?

- By setting an appropriate radius you can cover most of the country with a few events.
- Some people will be in the catchment area for two or event three.
- Make sure you invite them to all the nearby locations.

8. THE LIST

Once you have done all of that you should have a list that looks like the one below.

First Name	Surname	email	Job Role	Advisor Type	Person Location	Firm Name	Firm Postcode	Segment	Venues	Nearest Venue
Andrew	Caughtry	redacted@chasedevere.co.uk	Advisor (only)	Investment Advisor	Birmingham	Chase de Vere Independent Financial Advis	EC2M 1JJ	Wealth Manager	Birmingham	Birmingham
Andrew	Davis	redacted@beacon-ifa.co.uk	Advising Multi-Tasker	Holistic Advisor	Harpenden	Ellerd Investments Limited	AL5 2EJ	Holistic Financial Planner	Surrey|london	London
Alison	Baglow	redacted@allisonsfinancial.com	Advising Multi-Tasker	Holistic Advisor	St. Helens	Allisons Financial Planning Limited	WA11 8AH	Holistic Financial Planner	Liverpool	Liverpool
Anthony	Antoniou	redacted@bestinvest.co.uk	Investment Manager/Advi	Investment Advisor	Holborn	Evelyn Partners Investment Management Se	EC2V 7BG	Wealth Manager	Surrey|london	London
Andrew	Snowball	redacted@greycoatfs.com	Advisor (only)	Holistic Advisor	London	Greycoat Financial Services Limited	SE1 1TY	Holistic Financial Planner	Surrey|london	London
Anuj	Vashisht	redacted@chasedevere.co.uk	Advisor (only)	Holistic Advisor	London	Chase de Vere Independent Financial Advis	EC2M 1JJ	Wealth Manager	Surrey|london	London
Anthony	Antoniou	redacted@evelyn.com	Investment Manager/Advi	Investment Advisor	Holborn	Evelyn Partners Securities	EC2V 7BG	Wealth Manager	Surrey|london	London
Anne	Cartwright	redacted@matrixmodel.co.uk	Advisor (only)	Investment Advisor	Wirral	The Matrix Model Group (UK) Ltd	L1 0BG	Wealth/Investment Advisor	Liverpool	Liverpool
Aaron	Abraham	redacted@lonsdaleservices.co.uk	Advisor (only)	Investment Advisor	Harpenden	Lonsdale Services Ltd	AL2 2DD	Holistic Financial Planner	Surrey|london	London
Anthony	Cartlidge	redacted@cartlidgemorland.co.uk	Advising Multi-Tasker	Investment Advisor	London	Cartlidge Morland Wealth Management LLP	E1 8AN	Wealth Manager	Surrey|london	London
Andrew	Agar	redacted@tpllp.com	Advisor (only)	Investment Advisor	Crawley	True Potential Wealth Management LLP	NE15 8NX	Holistic Financial Planner	Surrey|london	Surrey
Antony	Baker	redacted@successiongroup.co.uk	Advisor (only)	Investment Advisor	Amersham	Succession Wealth Management Ltd	PL6 5FL	Wealth/Investment Advisor	Surrey|london	Surrey
Andrew	Elskamp	redacted@tpllp.com	Advisor (only)	Investment Advisor	New Milton	True Potential Wealth Management LLP	NE15 8NX	Holistic Financial Planner	Southampton	Southampton
Andrew	Carter	redacted@obsidian-financial.com	Advisor (only)	Investment Advisor	Liphook	Obsidian Financial Limited	B78 3PQ	Holistic Financial Planner	Surrey|Southampton|london	Surrey
Andrew	Coates	redacted@coatesandco.org	Advising Multi-Tasker	Holistic Advisor	Darlington	Coates & Co Financial Planning Ltd	DL3 8RH	Holistic Financial Planner	Yorkshire	Yorkshire
Audrey	McKinstry	redacted@raymondjames.com	Investment Manager/Advi	Investment Advisor	Chester	Raymond James Investment Services Ltd	EC2Y 9LY	Wealth Manager	Liverpool	Liverpool
Andre	Cove	redacted@indexfs.co.uk	Advisor (only)	Holistic Advisor	London	Index Financial Services Ltd	W1J 8NR	Holistic Financial Planner	Surrey|london	London
Andrew	Owen	redacted@premiercompanies.co.uk	Advisor (only)	Investment Advisor	Croydon	Premier Benefit Solutions Limited	CR0 2LX	Wealth/Investment Advisor	Surrey|london	Surrey
Anthony	Decunha	redacted@adwealth.co.uk	Advisor (only)	Investment Advisor	Leeds	AD Wealth Limited	LS14SA	Wealth/Investment Advisor	Yorkshire	Yorkshire
Antony	Baker	redacted@successionwealth.co.uk	Advisor (only)	Investment Advisor	Amersham	Succession Financial Management Limited	PL6 5FL	Holistic Financial Planner	Surrey|london	Surrey
Antony	Earl	redacted@equitasfinancial.net	Advisor (only)	Holistic Advisor	Plymouth	Equitas Financial (UK) Ltd	PL4 7AF	Holistic Financial Planner	Exeter	Exeter
Andrew	Gibbs	redacted@vintageassetmanagemen	Advisor (only)	Investment Advisor	London	Vintage Asset Management Ltd	W1H 1PN	Wealth Manager	Surrey|london	London
Anthony	Caldwell	redacted@vitafp.co.uk	Advising Multi-Tasker	Investment Advisor	Welwyn Garden C	Vita Financial Planning Ltd	AL7 1HH	Wealth/Investment Advisor	Surrey|london	London
Andrew	Gordon	redacted@eas-ifa.com	Advisor (only)	Investment Advisor	Maidenhead	Executive Advisory Services Limited	SL6 9HF	Holistic Financial Planner	Surrey|Southampton|london	Surrey
Alan	Gibson	redacted@aspirafp.co.uk	Advisor (only)	Investment Advisor	Leeds	Aspira Corporate Solutions Limited	BS1 6DZ	Wealth/Investment Advisor	Yorkshire	Yorkshire
Adrian	Kidd	redacted@ovationfinance.co.uk	Advising Multi-Tasker	Investment Advisor	BRISTOL	Ovation Finance Limited	BS1 4NH	Wealth/Investment Advisor	Bristol	Bristol
Ashley	Potts	redacted@abacusadvisers.co.uk	Advisor (only)	Investment Advisor	Charnwood	Tavistock Partners (UK) Limited	HR4 9AR	Holistic Financial Planner	Birmingham	Birmingham
Alan	Gibson	redacted@lebc-group.com	Advisor (only)	Investment Advisor	Leeds	LEBC Group Limited	EC4A 6EU	Holistic Financial Planner	Yorkshire	Yorkshire
Alana	Abel	redacted@visionifas.co.uk	Advisor (only)	Investment Advisor	Huddersfield	Vision Independent Financial Advisors Limi	WF12 0PU	Wealth/Investment Advisor	Yorkshire	Yorkshire
Annick	Crisford	redacted@rothschild.com	Advisor (only)	Investment Advisor	London	Rothschild & Co Wealth Management UK Li	EC4N 8AL	Wealth Manager	Surrey|london	London
Angela	Melanophy	redacted@ammfs.co.uk	Advising Multi-Tasker	Holistic Advisor	Sittingbourne	AM Mortgage & Financial Services Ltd	ME10 1DR	Holistic Financial Planner	london	London
Alan	Clifton	redacted@fpgonline.co.uk	Senior Advisor	Investment Advisor	Teddington	FPG Financial Services LLP	TW11 8DT	Holistic Financial Planner	Surrey|london	London
Adam	Cox	redacted@schroderspw.co.uk	Advisor (only)	Investment Advisor	Exeter	Scottish Widows Schroder Personal Wealth	EC2Y 5EA	Wealth Manager	Exeter	Exeter
Andrew	Manton	redacted@kingfinancial.co.uk	Advising Multi-Tasker	Investment Advisor	Northampton	King & Co Financial Services Limited	NN1 4EP	Wealth/Investment Advisor	Birmingham	Birmingham

The right people being invited to the best venues.

9. TEAM

If it doesn't, and you can't get the data you need to make your events the success you want them to be we can help.

ANDY MARSON

Having worked in Financial Services for over 30 years Andy really understands the market.

He has built a suite of market leading products that really help organisations turn 'data led' from a slogan into reality.

GEOFF GREENSMITH

With 40 years' financial services experience, Geoff has comprehensive knowledge of intermediary distribution products and services.

He can help clients get the best from their contact data.

PAMELA DAVEY

Pamela has enjoyed managing relationships for over 25 years.

Through integrity and building trust with clients, she has successfully addressed business problems and delivered and implemented data led solutions.

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THANK YOU

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