



# TAVISTOCK PROTECT

MORTGAGE & INSURANCE SPECIALISTS

TAKE YOUR CAREER  
TO THE NEXT LEVEL

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## THE STRENGTH IS IN OUR NAME

### Be a part of our success

Tavistock Protect is one of the fastest growing mortgage and insurance specialists in the UK, dedicated to providing advisers with the most innovative and advanced propositions possible.

As a wholly owned subsidiary of Tavistock Investments Plc, we aim to provide advisers with the freedom to excel and achieve their ambitions, without constraint.

Tavistock Investments Plc is an AIM listed financial services group with over 400 advisers located throughout the UK. With over 80,000 clients and more than £5bn of investments under management, we are committed to setting industry-leading standards for protection, financial advice and wealth management.

We believe that our combined revolutionary thinking will enable us to deliver the very best service possible to our advisers and clients.

Our market-leading proposition focuses on six key areas:

- Product range and pricing
- Adviser reward and support
- Opportunity for personal & business growth
- Client offering
- Paid for qualifications
- Enhanced retirement options





Access to one of the largest insurance panels in the UK including all major providers, such as:



## NEW OPPORTUNITIES AVAILABLE TO YOU

### The group offers:

- Protection
- Mortgages
- Pensions
- Investments
- Estate Planning
- Wills
- Long term care/Equity
- Household Insurance
- Commercial Insurance
- Business Finance and leasing





## Our commitment to innovation and excellence sets us apart from the competition.

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With over 400 advisers and offices located throughout the UK, we believe we have the infrastructure and resources to provide our advisers with everything they need to excel in their careers.

We believe that our advisers should never have to sit on the fence when it comes to their ambitions. We want to help you define your career and progress to the level you desire.

With access to our training academy, we cover the costs of the training needed for our advisers to become managers, CeMap professionals and financial advisers.

We pay commission from providers in advance, weekly, and on an indemnified basis. Commissions are structured into different tiers, designed to reward individuals as they progress within the company.

Unlike many in the industry, we do not load our clients' premiums to fund bigger commissions for our advisers. We have balanced, generous commissions with the lowest-priced premiums, allowing you to confidently grow your business on a solid foundation of long-term client relationships.

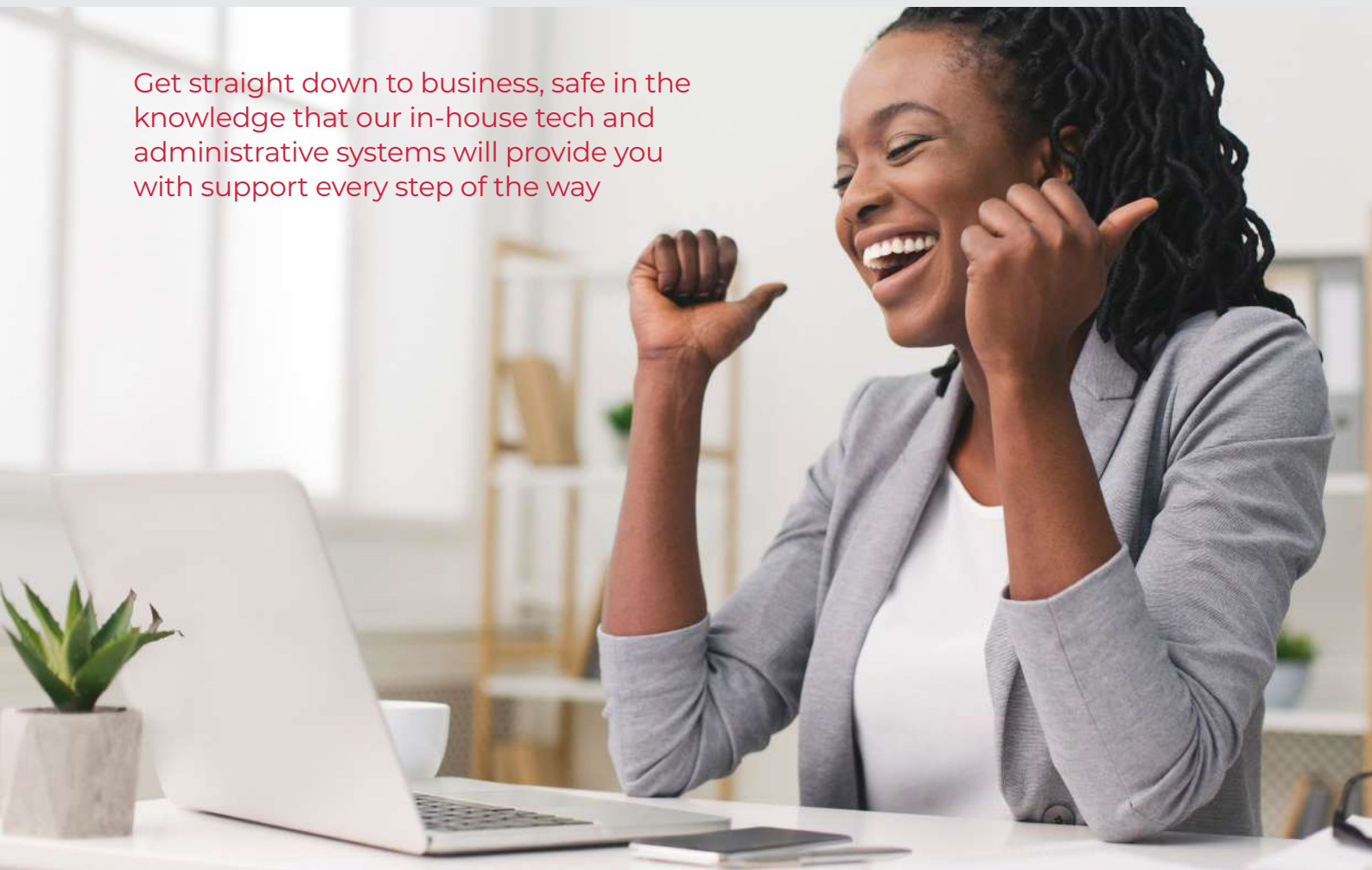
Management proposition - we know just how important a manager's role can be therefore, we have positioned our package to be unique and one of the most competitive in the industry. In addition to enhanced commission rates, our managers receive a guaranteed income, an override on their team's business, including an additional bonus structure with up to £20,000 in bonus payouts each year. Our package has been specifically structured to allow our managers to focus on the job while being rewarded and remunerated accordingly.

# IN BUSINESS FOR YOURSELF, BUT NOT BY YOURSELF

Discover how we, at Tavistock Protect, can help and support you to grow a successful business:

- Career development, mentoring programme and training academy with qualifications paid for
- Ability to curate your own career path as either a protection or financial adviser, as well as managing your own team
- Access to various sourcing systems for both protection and mortgages
- Access to our marketing library allowing you to compliantly promote yourself via social media
- No professional indemnity or regulatory worries – we look after this for you
- No joining or costly monthly fees - we cover all the costs
- Access to one of the largest protection panels in the UK including all major providers
- No loaded premiums – providing our clients with the most competitively priced premiums in the market

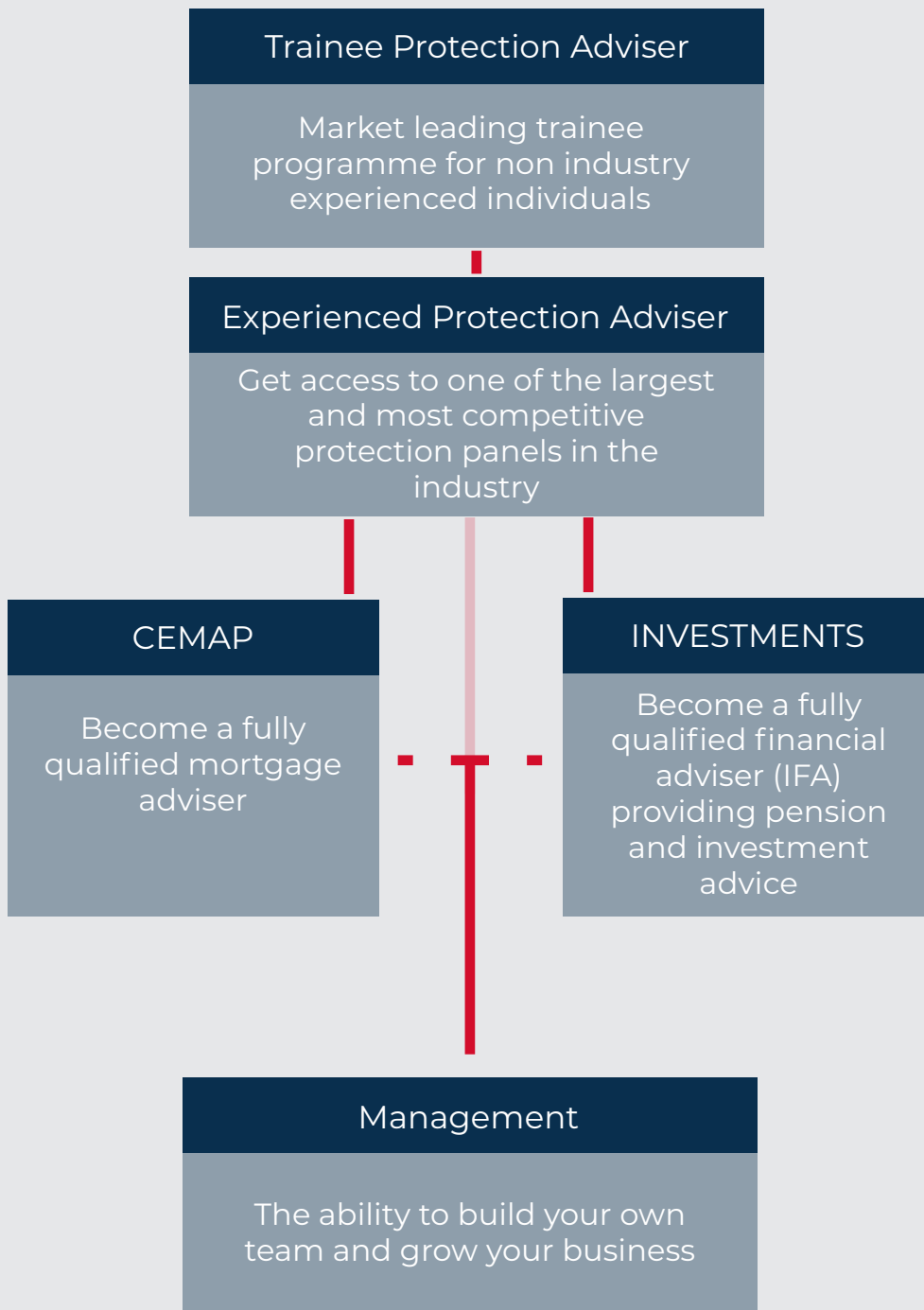
Get straight down to business, safe in the knowledge that our in-house tech and administrative systems will provide you with support every step of the way





## DEFINE YOUR OWN CAREER PATH

We aim to recruit the best, whether you are an industry experienced adviser or an individual with huge potential to grow within the company. No matter what stage of your career you are at, we have a pathway for you because we believe that anything is possible when you have the right tools and driving force behind you.





### **Trainee Adviser Programme**

If you are just starting out in the industry our trainee adviser programme helps you progress towards Competent Adviser Status (CAS). Our market-leading programme gives you the knowledge and skillset to provide compliant advice while maximising your earning potential. Our programme has been designed to lead you through your journey each step of the way, with the primary goal of getting you to Competent Adviser Status, taking your career to the next level.

### **Career Development Programme**

As a Competent Adviser, you have access to our full panel of providers, one of the largest in the UK, and the opportunity to progress up the ladder to management level. For those interested in the mortgage industry, we offer a programme that leads to CeMAP certification, allowing you to provide your clients with advice on both mortgages and protection.

### **The Academy**

As a Tavistock Protect adviser you can define your own career path with access to our training academy. You will be able to train and qualify for the role you want, with all costs covered by us\*.

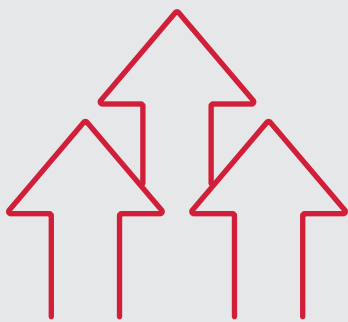


\*T&Cs apply





**work with us -  
not for us!**



## Investing for the future

At Tavistock Protect we want to reward advisers for their hard work, loyalty and commitment. Our ability to understand our advisers has always been our most valuable asset and we are fully aware of the importance of being able to plan for the future. So, what better way to reward our advisers than with a bonus scheme to say thank you for your loyalty and contribution. Therefore, at each 5 year anniversary we review the value of your book of business, together with the quality of your work and calculate your contribution to the bonus scheme. This bonus scheme can continue to run throughout your career, like a retirement fund, and help to provide financial security for when you need it most.

More information regarding the scheme is available upon request.

\*T&Cs apply



# ABOUT THE TAVISTOCK INVESTMENTS GROUP



## Wealth Management

Tavistock Private Client is a multi-award winning financial planning firm, providing services to predominantly higher net worth private clients.

Tavistock Asset Management delivers institutional quality discretionary portfolio management at a retail price, providing individuals with the benefits of collective buying power to ensure their portfolio management, platform and dealing charges are extremely competitive.

Tavistock Protect offers clients a comprehensive range of life insurance and critical illness policies and income protection policies that are tailored to meet their individual needs and budget.

## Networks

Our financial advice networks provide administration, compliance and accounting services to self-employed, independent financial advisers. Advisers can become a Registered Individual (RI) of Tavistock Partners, or become Appointed Representatives (AR) of The Tavistock Partnership.





## OUR TAVISTOCK EXECUTIVE TEAM

The Tavistock leadership team combines considerable expertise with over 200 years of experience covering:

- running public companies
- investing in financial markets
- building and acquiring financial services businesses
- ensuring stringent governance, risk, compliance and financial controls
- leading small, medium and large scale domestic and international companies





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