Succession Planning

planning for your future

INTRODUCTION

Personal Touch has a history of helping IFAs and Mortgage Brokers grow and strengthen their own businesses.

Personal Touch has now produced a scheme to help you plan your own retirement. This plan is designed to make sure that the transition from the Financial Services Industry to 'out of industry' is made as hassle free as possible.

You can be assured that the plans offer;

- Guaranteed levels of income
- Potential lump sum payment in event of your death
- Unrivalled income stream for new business
- Security in the knowledge that YOUR clients are being looked after

The process could not be simpler and with the backing of a major financial institution as well as award winning technology – you know your **income** will be **safe** and **paid on time every time.**

What's more, our experienced and professional staff will help you every step of the way.

THE PLAN

This plan is designed for those who wish to leave the financial services industry immediately but want to ensure that clients are cared for in the manner that they have been throughout the time you have had a relationship with them.

Key Features

75% of all renewal and trail income will be paid for life – ensuring the security a consistent income stream brings.

Active management of your client base – giving you the knowledge that the ongoing financial services needs of your clients are being cared for – and that you are treating them fairly in your retirement.

Death Benefit – The potential of a lump sum equivalent to 1x the renewal income to be paid to your estate in the event of your death – giving you peace of mind that your dependents will benefit from the value in your business when you are gone.

Ongoing income stream – where new business is written as a result of the management of your client base 30% of this will be passed to you – giving you the knowledge that you can even increase your income in retirement.

ABOUT PERSONAL TOUCH

Personal Touch offers clients a total whole of market panel across all product ranges. It has an impressive track record of growth and has evolved into one of the largest and financially strong financial services businesses in the UK.

What does this mean for you?

Quite simply, it means that you and your clients could not be in safer hands.

YOU can be sure due to the financial strength of Personal Touch that your income for life is being provided by a sound financial institution.

YOUR CLIENTS can be sure that they will be looked after for life whatever their financial needs, in a totally independent way, and that the business will be around for many years to come.

WHAT TO DO NOW

Simply complete the enquiry form attached and we will contact you. You can also fill in the form online by visiting www.personaltouchda.com /Services/Retirement_Planning.html For any queries regarding the information outlined in this document you can email, successionplanning@personaltouchfs.com or call our dedicated teams on the below numbers:

contact us

0121 767 1070

email us: successionplanning@personaltouchfs.com