

# Professional Paraplanner

## Introducing the *Professional Paraplanner Investment Committee*

Recent in-depth research into the role of paraplanners within financial planning/advice firms confirmed that increasingly they are not only sitting at the core of the business but they are taking ever greater responsibility for the financial planning process outside of the client relationships. 87% of paraplanners reported that they have influence in the product selection process.

This evolving business structure is freeing up financial planners/advisers to focus on building client relationships and bringing in new business to the firm. This is helping to create greater efficiencies within advice firms, making them more effective and more profitable as businesses and hence, is the way the market is increasingly heading.

Fundamental to this is the research and recommendation of investments.

Within the research, 77% of the paraplanners surveyed say their firms have investment committees, with over half meeting on a quarterly basis and 23% every month. 34% of paraplanners attend the committee meetings and 6% chair those meetings. 13% of paraplanners report that they have become part of the investment committee within the past two years.

In addition, 70% said their firm either runs an investment panel or has risk-rated portfolios selected in-house.

Forward-thinking investment brands who are engaging with the paraplanning community are already seeing the results in marked recognition of their products and services. Another factor these brands have recognised is that around 30% of paraplanners today say they aim to become the financial planners/advisers of the future.

*Professional Paraplanner* is offering asset managers the opportunity to rapidly raise their profile with the ever more influential paraplanning community.

Some of the areas we will be looking to cover include:

- Macro overviews and outlooks – to keep paraplanners informed and knowledgeable on economic and market issues
- Behavioural investing – how investors behave in different markets
- Understanding the different asset classes
- The need for and issues around effective diversification
- ESG and the growing trend towards responsible investing
- Researching and building a portfolio – practical insights into finding the right mix of investments
- Generating income for clients in retirement
- Decumulation strategies

Our editorial team is also open to suggested topics and contributions.

*Professional Paraplanner* has a five-year history as the only dedicated paraplanner publication in the market. Over those years we have built a strong engagement with the paraplanning community, through the monthly magazine, daily website, annual awards and our Technical Insight Seminars,

which have grown from 1 half day event in 2015 to 15 in 2019, with over 700 paraplanners registered to attend around the UK.

**The opportunity –**

Professional Paraplanner's Investment Committee will give investment specialist paraplanners access to unique and tailored content across print, online and in-person events. Launching in September with a new section in the magazine and website and with the first Investment Committee event on 7<sup>th</sup> April at ETC Venues, Liverpool Street, London.

Providers will be able to target advertising and content campaigns specifically at those paraplanners with influence and interest in the investment piece across print and online. They will also be able to engage these paraplanners with ideas, views, solutions and educate open minded, eager to learn individuals in person at the event series.

**Our initial event will be held at ETC Venues, Liverpool Street and will be a half day event. Delegates will be hand picked from our extensive database. Through our sister business Research in Finance we have unrivalled intelligence to allow us to identify the paraplanners most likely to benefit from the event.**

**For more information please contact:**

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