



RESEARCH
IN FINANCE

Research in Finance is a market intelligence, publishing and business information provider, that specialises in the UK and European financial services industry. With over 45 years cumulative experience within the retail, institutional and private investor markets, we believe our understanding makes us unique and an invaluable partner with any business working within the sector.

RiF began researching the paraplanner market in 2013 on behalf of several leading asset managers, platforms and life companies. Through this we have developed an unrivalled understanding of this crucial sector of the advisory market, building the largest and most current data available.

Professional Paraplanner

The magazine for
paraplanners
and financial
technicians
May 2019

Venturing out

Kat Mock talks about starting her new outsourced business, Unity Paraplanning – why and how she did it

Retirement transitioning

Dan Atkinson flags recent academic research

Perceptions of longevity

Why paraplanners must look beyond ONS figures

Inheritance Tax

Case study: Same problem different strategies

Positive impact investing

Q&A with portfolio manager Damien Lardoux

PLUS
TOD: WHAT
TO EXPECT IN
AF5 & R06
EXAMS



Media Pack 2020

- Launched in May 2014
- Monthly magazine
- Circulated to 3,500 UK based paraplanners and financial technicians
- Digital and print formats

2020 Issue Dates

30/1

27/2

26/3

30/4

28/5

25/6

27/8

24/9

29/10

26/11



As a paraplanner I usually get ignored until the advisor mentions to the providers that I'm the one choosing the providers & products.

Ad copy due 8 days prior

Professional Paraplanner

The magazine for
paraplanners
and financial
technicians
December 2018

Later life care
planning
Using flexible
reversionary
interest trusts

Pension
transfers
HMRC's
interpretation of
death benefits

What do I do?
Dan Atkinson
provides insight
into his role as
head of Technical

IHT and
ISAs
Q&A on how
inheritance tax
works with ISAs

New way of working

Chetan Ravalia and Codie Smith of Cooper Parry Wealth, talk about how their paraplanning roles have changed as part of the firm's new operational structure

PLUS:
TOD: WHAT
J03 AND AF2 HAVE
IN COMMON



Mike @M_Paraplanner · May 22

You can tell Paraplanning really is it's own profession when we get our own Magazine [#paraconf](#) @ProfParaplanner pic.twitter.com/VuKueovitF



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It appears the Retail Distribution Review (RDR) has had both a positive and negative effect on the intermediary market. One segment of the industry which has seen a resurgence in its relevance, especially within the product selection process and the construction of client solutions, is the paraplanner.



Prof Paraplanner Mag,
You were mentioned in a Tweet!



Richard Allum @TheParaplanner

If you're a paraplanner and not yet signed up to receive @ProfParaplanner you should do. Damn fine read.

14 Jan 2015 10:41

TYPICAL PARAPLANNER



FEMALE
AGE

37

BEEN
PARAPLANNER
FOR

5
YEARS

SALARY

25

TO

35K

ARE A KEY
INFLUENCER
IN THE BUSINESS

SPEND MOST OF
THEIR WORKING DAY
REPORT WRITING,
RESEARCHING
FUNDS AND
MAKING PORTFOLIO
RECOMMENDATIONS

USES MANY DIGITAL
PRODUCTS AND
TOOLS TO HELP
MAKE DECISIONS

The role of a paraplanner has been around for many years and quite often represented by individuals who enjoyed the data side of the advisory market, but were not especially interested in the client-facing element. Their career path was fairly restricted as the job was previously views as a stepping stone to becoming an adviser. That has now changed with the vast majority of paraplanners looking to remain and develop in their current role. Opportunities exist now to take paraplanner specific examinations and advisory firms are battling to hire the best out there to enhance their proposition. The future is very bright for paraplanners.

Features Include:

Viewpoint

Para-Meters – Monthly sentiment survey
 Portfolio building
 Client suitability
 Investments
 Decumulation
 Retirement planning
 Fund ratings
 FE Analytics guides
 Preparing cashflows
 Using technology - websites, software, apps etc
 Platform due diligence
 Ethics
 Communicating with advisers
 Training, experience, minimum standards
 Managing expectations
 Qualifications and exam tips and training
 Independence (CIPs)
 Compliance for self employed PPs
 Tax and trust guidance
 Career Progression
 Making business owners see value



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a bid to attract more staff, new research has shown. According to MetLife UK, more than half (53%) of SMEs will increase the benefits they offer staff over the next two years. Of the 34,000 businesses polled as part of its...

READ ARTICLE

CLIENTS ARE NEVER TOO YOUNG TO WRITE A WILL
29 SEPTEMBER 2019
Clients of all ages should be encouraged to write a will, as stats show that millions of individuals consider themselves too young to need a will. According to will-writing service Farewill, the question of age remains one of the biggest inhibitors to writing a will, with 31 million Brits deciding they are too young...

READ ARTICLE

TDQ: TEST YOUR KNOWLEDGE – QUESTIONS
26 SEPTEMBER 2019
For Professional Paraplanner's TDQ (Training, Development and Qualifications) series, we have teamed up with key support providers, such as Brand Financial Training, to provide our readers with the very best in training, development and exam support. This series aims to provide you with valuable advice and guidance materials to help you achieve your training...

READ ARTICLE

TECHNICAL AND DEVELOPMENT FEATURES YOU MAY HAVE MISSED
5 SEPTEMBER 2019
In case you missed them over the summer, here are 10 of the most popular technical and development articles we published over the past few weeks. How top slicing has been changed for ever – and what to do now Taxation of trust income PROD rules and risk tolerance – an overview Property tax ...

READ ARTICLE

COHABITING COUPLES LACK OF RIGHTS CAUSE FOR CONCERN
1 SEPTEMBER 2019
Office for National Statistics (ONS) show that 3.4 million people now cohabit – around 1 in 8 people aged 16 or over. The data also shows that half of cohabiting couples own property and nearly half have financial assets including cash, shares and trade

Current advertisers include:

Professional Paraplanner Online

- Launched in July 2015
- Visited by 5,500+ paraplanners monthly
- 3,500+ registered to receive daily news/feature alerts
- Technical content is the most viewed

- | | |
|-------------------|-------------------|
| • Prudential | Utmost Wealth |
| • BlackRock | Parmenion |
| • FundsNetwork | Legg Mason |
| • Invesco | HSBC |
| • Investec | Transact |
| • Morningstar | Liontrust |
| • Baillie Gifford | Premier |
| • Architas | STEP |
| • Scottish Widows | Aberdeen Standard |



The Professional Paraplanner Awards. These awards are designed to recognise the individuals and teams going the extra mile in the paraplanning profession. We will also allow them to vote for their favourite providers over a number of relevant categories. The awards will follow of London Technical Insight Seminar with attendees of the event remaining and further invitations to those nominated paraplanners and providers.

The Paraplanner of the Year Award

Entry is by self-nomination. Each candidate must write a 500-word essay on a set topic. Shortlisted candidates will be called to interview.

Each candidate will be asked to provide contact details of their financial planner to provide a testimonial should they be shortlisted.

Paraplanning Team of the Year

Entry is by self-nomination. Each team will be asked to provide a 500-word statement on why they should be considered the team of the year. A representative from shortlisted teams will be called to interview.

Each team will be asked to provide contact details of someone from their firm to provide a testimonial should they be shortlisted.

Personality of the Year

Paraplanners can nominate the industry figure they feel has had the most positive impact on the paraplanning profession and/or community over the past year.

Headline sponsorship

- Branding and association with the awards on and offline
- Branding at the awards area at the venue
- Opportunity to present awards to all winning paraplanners
- Cover wrap on the awards supplement showcasing the winners and intro content in awards feature on and offline

Cost: £12,500





Professional Paraplanner is extending its event programme in 2020 after feedback from paraplanners. Following extensive research and consultation with the paraplanning community, an agenda has been carefully crafted to offer the most relevant and appealing content for this highly influential part of the advice chain.

The format for each event will include an opening plenary session followed by a series of focussed seminars. Each seminar will be 40minutes plus a Q&A and qualify for structured CPD. The events will conclude with a panel debate or independent speaker then closing with a networking lunch.

2020 Venues – Exeter, Birmingham, Norwich, London, Southampton, Edinburgh, Nottingham, York, Manchester, Bristol, Cardiff, Chester, Reading, Glasgow, Colchester and Newcastle.



The events will cover some of the following topics and themes:

- Retirement – new retirement options; pensions transfers.
- Tax planning – trusts in estate planning; IHT; trust taxation, taxation of investment bonds; LTA testing.
- Investment – risk profiling; market view; the quest for income; ETFs; portfolio building; DFM v Multi-Manager; research process
- Technology – cashflow planning; platform due diligence; fund research tools.

Sample of firms with Paraplanners attending Technical Insight Seminars

Advies Private Clients	Lovewell Blake Financial Planning Ltd
Alan Boswell Group	Lowes Financial Management Ltd
Albert Goodman Chartered Financial Planners	Lucas Fettes & Partners
Almary Green Investments	Manse Capital Limited
Arbuthnot Latham	Mattioli Woods plc
Argentis Financial Management Limited	Mazars Financial Planning Ltd
Ashcourt Rowan	Messer & Matthews Limited
Atlantic Swiss Wealth Management	Monahans Financial Services Limited
Beacon Wealth Management Ltd	Moore Stephens LLP
Bellpenny	Myers Davison Ginger Ltd
Beaufort Asset Management	Newell Palmer & Associates Ltd
Berkeley Burke	Oaklands Wealth Management Ltd
Bestinvest Wealth Management	Origen Financial Services Limited
Blackstone Moregate	Oval Financial Services
Brewin Dolphin	Pannells Financial Planning Ltd
Carbon Financial Partners Ltd	Parkgate FS LLP
Carpenter Rees Ltd	Partners Wealth Management LLP
Clay Rogers & Partners Ltd	Pearson Jones Plc
Charles Stanley	PKF Cooper Parry Wealth Ltd
Chase De Vere	Premier Wealth Planning
Clarion Wealth Planning Ltd	Rathbones
Close Brothers Asset Management	Roundhouse Financial Services
Crystal Wealth Management LLP	Salisbury House
Deep Blue Financial Limited	Saltus Investment Managers
deVere United Kingdom	Sanlam Private Wealth
DHM Wynchwood LLP	Sedulo Wealth Management Limited
Edinburgh Wealth Management	Smith Jackson Wealth Consultancy Limited
Fairstone Financial Management (City) Limited	St. James's Place
Emery Little LLP	Stafford House Investments
Fleet Street Financial Ltd	TAG Wealth Management
Grant Thornton UK LLP	Talbot and Muir Limited
Greystone Financial Services Ltd	The Citimark Partnership Limited
HC Wealth Management	The Timbank (UK) Ltd
Informed Choice Ltd	Thomas & Gentry IFA Ltd
Investec Wealth & Investment Ltd	Thomas Miller Investment
Jelf Financial Planning	Towergate Financial
John Lamb	Towry Limited
Kellands (Hale) Ltd	Truestone Asset Management
LEBC Group Limited	Vintage Financial Limited
Libertas Wealth Management	Warwick Butchart Associates Limited
LighthouseCarrwood	Westerby Investment Management
	Woodhead Wealth Management

2020 Print Rate Card

Double Page Spread (DPS)	£5,500
Full Page Colour	£3,250
Half Page Horizontal	£1,950
Quarter Page Horizontal	£1,400
Inside Front Cover DPS	£6,500
Back Cover	£3,750
Bookends	£3,500
Half Page Dps	£3,500
Strips	£2,375
Cover Wrap	£14,750
Bound Insert	£9,750
Advertorial	£4,500
Online	Contact sales@researchinfinance.co.uk

Production contact –
production@researchinfinance.co.uk
 0207 104 2239

Online and events costs - contact
Richardley@researchinfinance.co.uk
 0207 104 2239