2012 RETAIL
DISTRIBUTION
REVIEW DEADLINE

taxbriefs
financial publishing

Why your business needs The Business of Advice

How to manage and develop a successful financial advice business by the leading expert David Shelton.

For the partners, principals and managers of independent financial adviser practices needing to adapt to the new environment.

In association with The Personal Finance Society

Unique toolkit to take you through RDR

How to manage and develop a successful financial advice business *by David Shelton*

Taking you through transition

Putting together a new business model is a pressing challenge for all business owners and senior managers of financial advice businesses. And the run-up to the 2012 Retail Distribution Review deadline will put many businesses under unprecedented strain.

How can you respond decisively to the new regulatory demands while maintaining the demands and culture of your own business?

Your road to sustainable profitability

The Business of Advice gives you the tools to develop and manage your business more effectively through the transition process. Based on his unparalleled experience of running over 500 consultancy exercises with firms, David Shelton takes you step by step through the key practical business principles. These are brilliantly illustrated with case studies, focus points and diagrams. The seven sections cover:

- developing your strategy
- building your service proposition
- successful marketing
- finance & growth
- efficiency & IT management
- recruitment & remuneration
- fine tuning your business

Online resources www.businessofadvice.co.uk

As a buyer of The Business of Advice, you will have access to a dedicated website holding e-versions of many valuable documents and templates. You can customise these to help you work through the processes and quickly put the strategies into practice. This unique combination of text and online resource lays the groundwork for adapting the latest ideas to enhance your business.

FREE DOWNLOADS AVAILABLE TODAY!

"Are you running your business effectively?"

"Is your financial advisory business well positioned for the RDR changes?"

Focusing on the way ahead

Written in a clear, direct and jargon-free style, **The Business of Advice** focuses on the key issues for building profitability and capital value in your business, providing you with:

- a clear response to RDR
- strategies for coping with lack of capital and scale
- a route-map for transition from commission to adviser charging
- the key to retaining and recruiting competent people

The Business of Advice is the crucial development and management resource for every advisory business.

Practical 'toolkit' for success

This practical approach is reinforced by a unique array of business planning techniques including: checklists, draft outline plans, alternative strategies, organisation charts, pro forma documents and decision trees. These enable you to measure and directly apply the processes and ideas to your businesses. At every stage you can benchmark your business, and focus on taking relevant action.

RAVE reviews

"We have benefited from David's excellent and insightful approach over a number of years and have invariably found this has helped to create a powerful framework for making effective business decisions."

***Allan Rosengren** - Chairman Falcon Group Plc.*

"David has a unique approach to business planning which has helped us join up our thinking on business change management. Time spent with David has put us on the right track".

***Nick Bamford** - Chief Executive Informed Choice*

"David has worked with us over a number of years on business planning and has provided a real focus for the development of the business"

***John Chapman** - Managing Director Torquil Clark Holdings Ltd*

"Do you have a strategic plan?"

Who is it for?

The Business of Advice is written for partners, principals and managers of IFAs and all financial advisory firms, large and small, who need to adapt to the new business environment.

David Shelton
Head of IFA Business Planning Scottish Widows

About the author

David Shelton is head of IFA Business Planning at Scottish Widows with over 20 years' experience in marketing and business development in the financial sector. For the last 10 years his key project has been helping a wide range of IFAs to make real and lasting changes to their businesses, dealing with issues from strategic planning to implementing the TCF initiative.

The Personal Finance Society
Standards | Professionalism | Trust

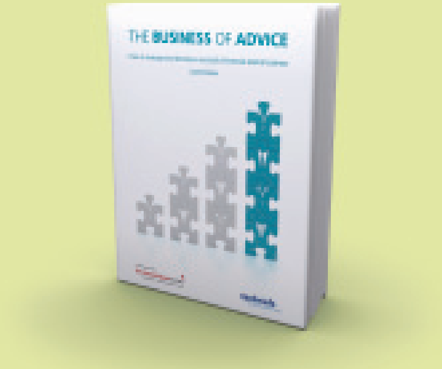
Order Form
THE BUSINESS OF ADVICE

taxbriefs
financial publishing
www.businessofadvice.co.uk

○ **Please send me:** [ ]
copy(ies) @ £145 per book

○ **I wish to order 3 – 9 copies at 10% discount.**
Please send me:
[ ] [£]
copy(ies) @ £130.50 per copy

○ **I wish to order 10 or more copies, please contact me.**



Books Total [ ]

Plus p&p (£6.00) per order [ ]

TOTAL PAYABLE [ ]

The Business of Advice *How to manage and develop a successful financial advice business by the leading expert David Shelton. Specially created for the partners, principals and managers of independent financial adviser practices that need to adapt to the new environment.*

I wish to pay by one of the following methods: *please tick*

○ **I enclose a cheque for £** [ ]

made payable to ***Taxbriefs Limited***

○ **Charge my Credit Card** [ ]

○ *visa* ○ *switch* ○ *amex* ○ *mastercard*

Card number

Expiry Date [ ] *Issue* [ ] *Security Code* [ ]

Cardholder's signature
(Please give name and address of cardholder below if different)

○ **Please invoice me:** [ ]

My order reference is: [ ]
(or attach a company purchse order)

Your contact details

Name: ____________

Company: ____________

Delivery address: ____________

Postcode: ____________

Tel: ____________

Fax: ____________

Email: ____________

Website: ____________

Signature: ____________

Date: ____________

If you do not wish to receive mailings from Taxbriefs Limited, please tick here ☐

Registered in England No. 1247331. Registered Office: 131 Edgware Road, London W2 2AP

VAT Reg. No. 756 959 62

Post To: Taxbriefs Limited, 2-5 Benjamin Street, London EC1B 1EH **Fax:** 020 7251 8867 **Website:** www.taxbriefs.co.uk