

# Grow, sell, or continue?

7th October 2021

# Benchmark Today

Benchmark strives to be the market leader of digitally-led, financial planning solutions

**1600 adviser  
partners**

**£18bn  
Platform  
assets**

**£4bn+ of  
DFM  
solutions**

**430+  
dedicated  
staff**

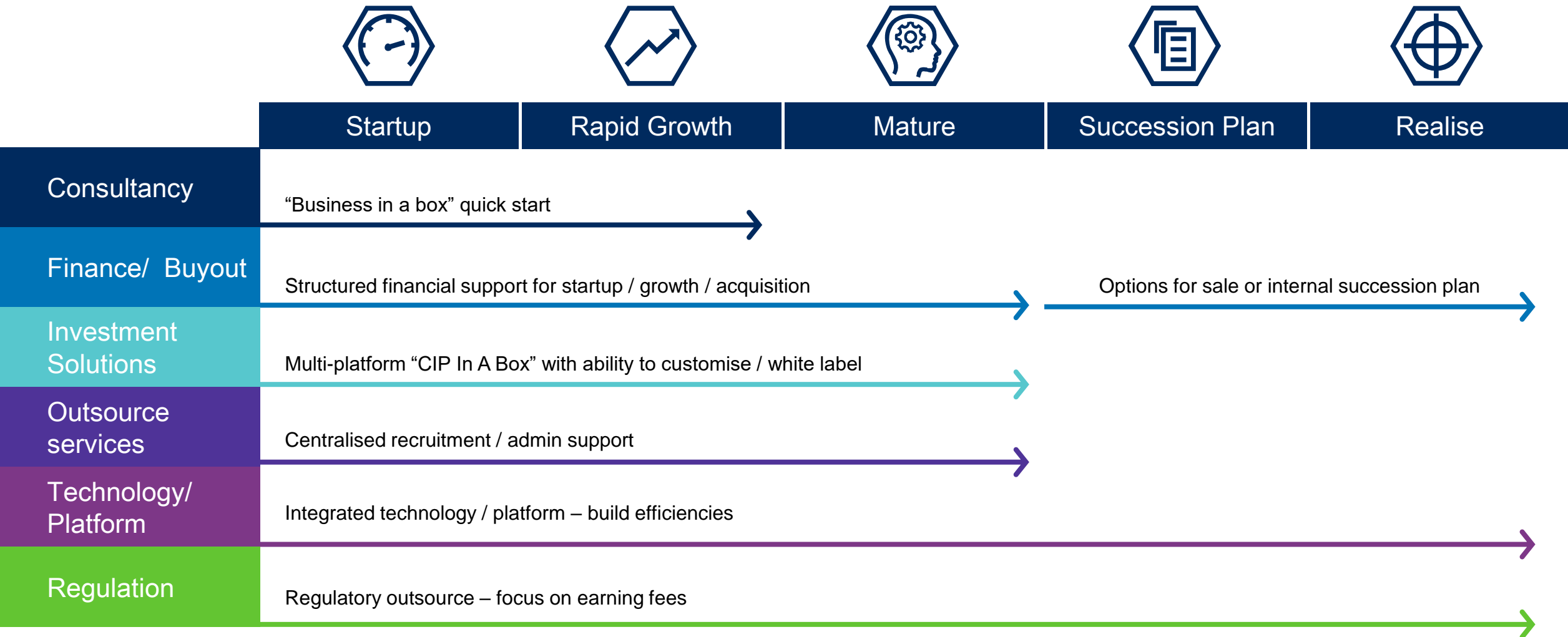
**100% owned  
by  
Schroders**

**Significant  
growth  
capital  
backing**

**Proprietary  
technology  
platforms**

# Our Propositions

We evolve alongside your business





# Schroders UK Adviser Pulse Survey

## May 2021



Half yearly Pulse Survey of Schroders' UK adviser clients.  
Full annual survey series started in 2014



Conducted online between 19 and 28 May 2021



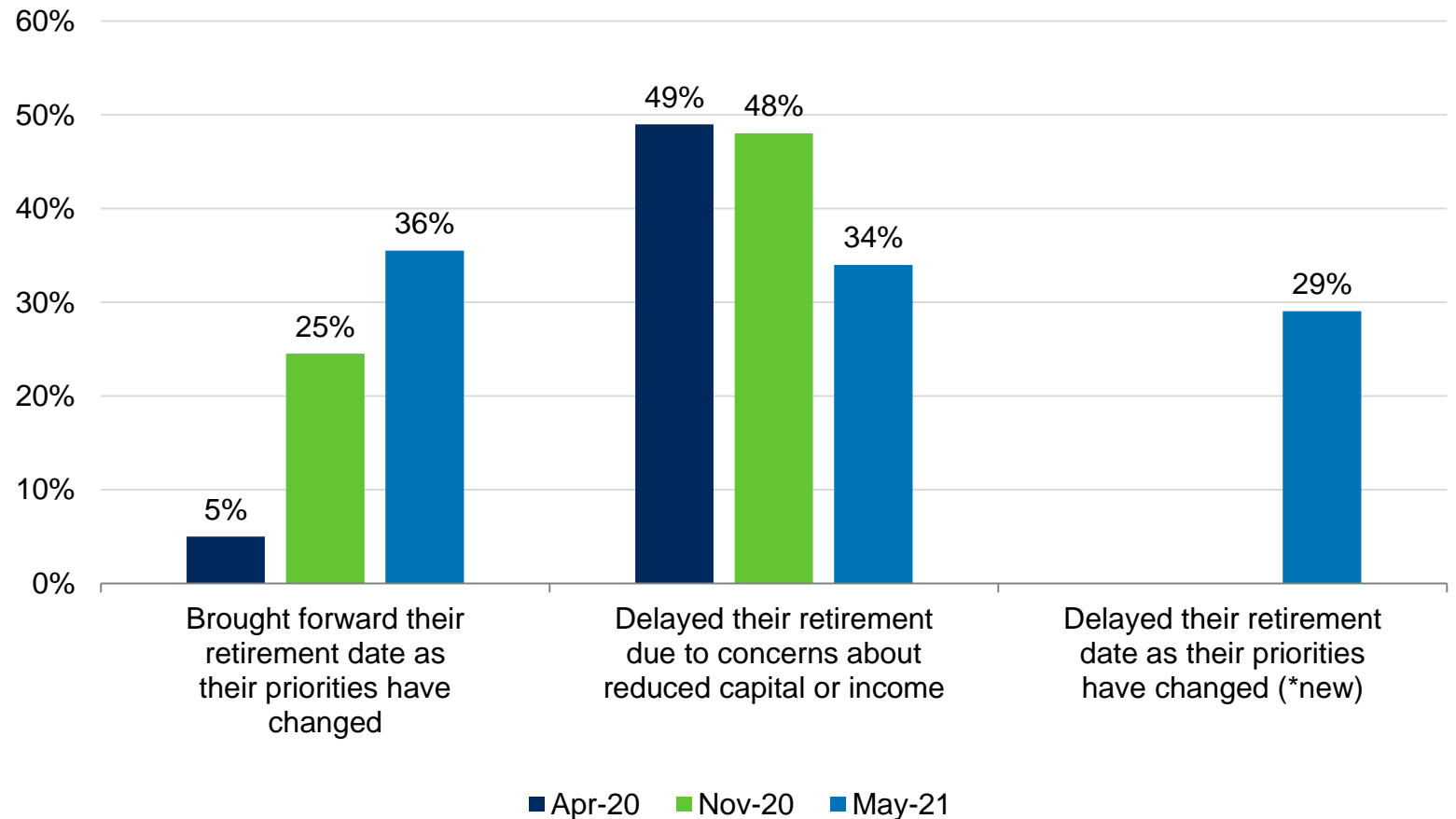
Completed by 161 advisers



# Retirement plans

- The proportion of advisers reporting that they have clients who have delayed retirement due to concerns about reduced capital or income has fallen from 49% to 34%
- The proportion of advisers reporting that they have clients that have brought forward their retirement date as their priorities have changed has risen from 25% to 36%
- Balanced against this, 29% of advisers also report that they have clients who have delayed their retirement date as their priorities have changed

As a result of the impact of coronavirus on markets, have any of your clients who are approaching retirement:



Source: Schroders Adviser Pulse Survey May 2021.

Strictly private and confidential.



# Grow, Sell or Continue?

Key considerations in deciding your future



Do you NEED to sell?



Who's buying – and why?



Will your staff and clients be looked after?



How do you maximise value?



# Key areas to prepare your business

What does this mean in practice?



Be acutely aware of your client proposition / segmentation / Fees / CIP



Regulatory / Risk / Data Security



Make the most of your technology



Engage your staff, let them know your intentions



Be clear about your cost base



Simplify and document your operational processes

# Disclaimer

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