



Fast Acting / Smart
Thinking

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Lifetime Group

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Private and Confidential

Adviser

1. Why are you in this business?
 - Control own destiny / unlimited earnings
2. How's it going?
 - 1 hour a day
3. Where do you want to be?
 - Balanced between work / family
4. What business are you in?
 - Trusted advice?
 - Transactional?



Clients

1. Trust
 - 3 parts to Financial Planning
2. Referrals
 - Trusts / Questionnaires
3. Review / Educate
 - Weekly / Monthly / Nudge / Annual
4. Lifetime
 - Face to face / phone / on-line / value

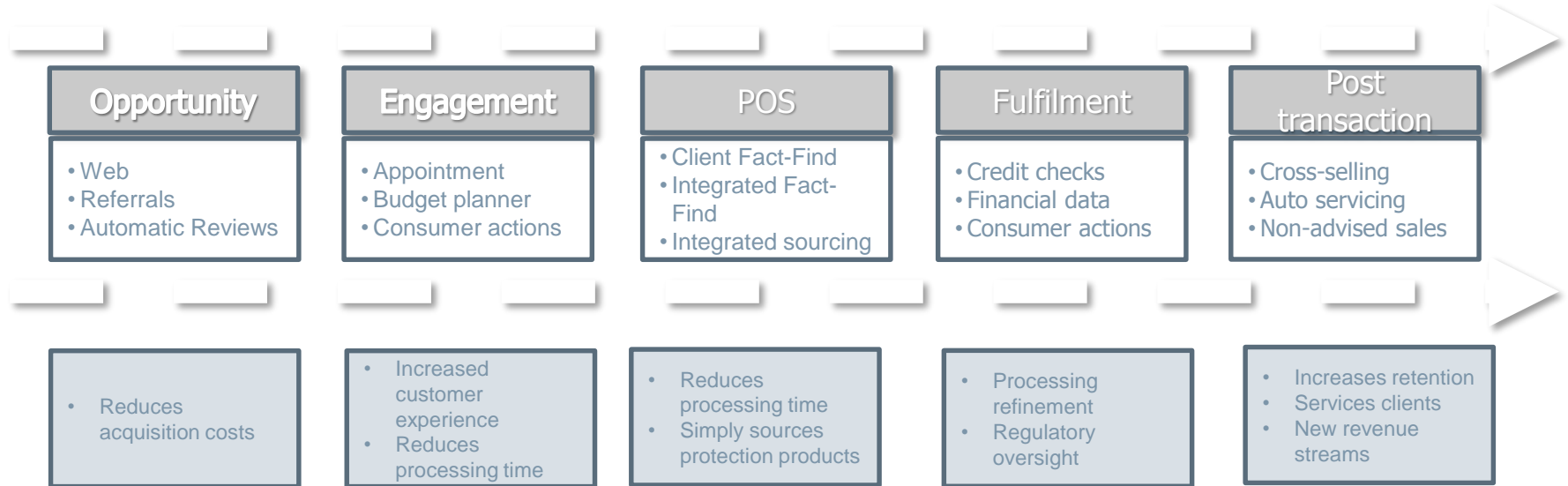


The Market

1. Providers
 - Those who support / those who.....
2. Regulator FCA
 - MMR / RDR
3. Networks / DA Status
 - Value / support
4. Technology / Robo
 - Embrace / heavy lifting



Now and into the near future



Tested platform principals



Intelligent & open integration



Client engagement



User experience



Simplified processes



Security and scalability





Our services

“Paul and his team are truly great professionals. I always recommend them.”

“Gary is one of the most professional and personable people I have ever met and I cannot fault his service. I would have no hesitation in recommending him / and or his company to anyone in the future.”

“Absolutely brilliant service. Have already recommended to family and will recommend to anybody I know that requires financial advice. It’s been a pleasure dealing with Steve, Carly and Karen, and they have taken a lot of the stress out of the house buying process.”




“We both think that Kelly went beyond the call of duty to get to know us and our needs. Not only would we recommend your company, we would recommend Kelly personally.”

“Kerry and Diane have been extremely helpful and supportive, I cannot thank them enough for the help that has been afforded to me.”

“Chris has been my advisor for nearly 15 years, and I have recommended him to several friends and family and to date I don't know of anyone I have recommended to him that has not used his service.”

“Anyone that I talk to about financial matters, I always say use Lifetime.”





*'Our industry does not need
a change of skillset. It needs
a change of mindset.'*

Lifetime.