



## IFA Solutions

Flexible retirement and business options from the leading Midlands Wealth Management practice.

The AFH Group founded almost 20 years ago by Chartered Financial Planner Alan Hudson, offers tailored financial advice across a broad range of tax and investment issues. Based in prestigious offices in central Bromsgrove, our ever-growing team of friendly, professional individuals has built an enviable reputation for delivering unbiased whole of market advice.

AFH offers a genuinely personal and approachable service, which sets our team apart. We firmly believe in working in partnership with clients, building long-term relationships based on mutual trust and respect. Unusually, we combine traditional IFA services with Discretionary Investment Management and Stockbroking. In short, the future of the industry – one of the new breed of large regional IFA practices.



Come and see us for a confidential, no obligation, discussion to see how we might work together to offer you and your clients the best long-term solution going forward.

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## IFA solutions from AFH Wealth Management

Not everyone has the same plans or ideas for their business, but most people would like someone they can trust to talk through the options available. So whether you want to retire and sell your business entirely, gain support whilst gradually handing over your business or simply want to be part of one of the most successful new breed IFA practices in the Midlands – AFH Wealth Management can help.

Our professional support team will help deal with the increasing demands and challenges facing IFAs such as, paraplanning, report writing, automatic client investment reviews and training. We're also proud of our progressive, friendly and professional culture that puts clients and old fashioned service at the heart of the business.

We offer 3 flexible options to help IFAs face the future positively and successfully:

1. A buy-out option for retiring IFAs looking to leave their clients in the best possible hands
2. A buy and keep option for IFAs looking to continue working but without the regulatory challenges of running their own business
3. The opportunity to join the AFH Wealth Management team and continue working as an IFA in a professional and supportive environment

### Which option is best for you?

#### 1. The Buy and Go Acquisition is ideal if:

- You're considering retirement or semi-retirement
- You want a fair price for your client bank
- You'd like a structured, sensitive but simple handover
- You want someone to talk to in confidence that you can trust

*"When my husband died I was left with an IFA practice and didn't know what to do. After meeting Alan Hudson I decided to sell the practice to AFH. They have an excellent back office system which made transferring the data for our 700 clients extremely easy and totally took the worry away from me. I am extremely happy with the professional way our clients have been treated."*

Jan McDonald – McDonald Churchill

#### 2. The Buy and Keep Acquisition works best if:

- You're tired of running your own business
- You'd like to spend more time with clients rather than on compliance issues
- You want a fair price for your business but would like to carry on working under your own brand
- You need help with RDR, administration, investment and technical issues
- You're worried about RDR requirements such as capital adequacy

*"It was a big decision to close my previous company, MMFS. Having an experienced technical and investment team to support me and an in-house economist means I can now share ideas with fellow professionals and feel part of a team. It also leaves me free to focus on what I do best - to concentrate on advising clients."*

Mike McConnell - Cert PFS

#### 3. Join AFH as a self employed adviser if you want to:

- Spend more time with your clients
- Earn more money and have a better work/life balance
- Write business without compliance hindrance
- Benefit from lead generation and network connections
- Operate without sales targets and league tables
- Have no fixed overheads but have access to efficient administrative, investment and technical support
- Benefit from Discretionary Investment Management
- Add value to your business whilst planning your exit strategy
- Consider our flexible practice buy-out options
- Partake in an excellent in-house training program with support towards professional qualifications

*"Joining AFH has helped me grow my business. I have received new clients from their lead generation system and have improved my knowledge by networking with the team and attending in-house training sessions."*

Karl Thorpe, BA Hons Cert PFS