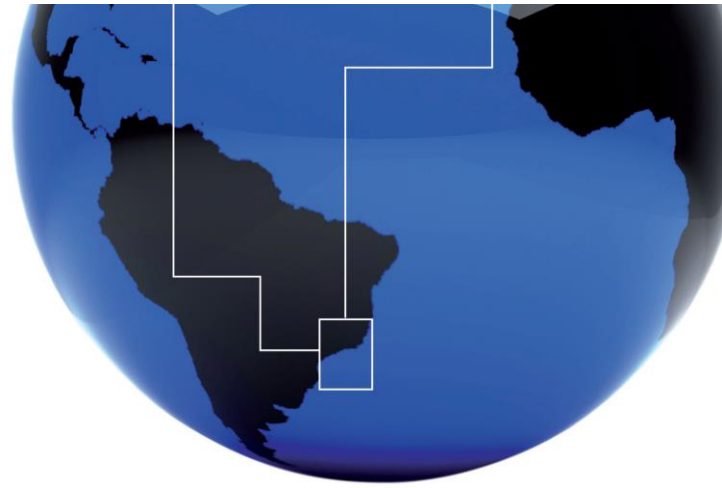


QB Partners are an independent specialist, providing technical, compliance and due diligence support in respect of international pensions and trust and estate planning.

These services are provided to professional advisers and product providers



How can we help?

QB Partners can help professional advisers through two methods of engagement:

For those advisers wishing to give the advice and transact the case themselves, our Suitability Report service and Online Service Platform are available. This route suits advisers who wish to develop a capability to advise on and transact a case themselves, whilst having the reassurance of ongoing support from a recognised, independent expert in the field.

For those advisers wishing to outsource the advice completely, our Specialist Adviser Panel service is available. This route allows the adviser to ensure that their client is properly advised by a UK FCA regulated adviser without taking any liability themselves.

For further information, please contact:

Tel: +44 (0) 1624 661232

Email: enquiries@qbpartners.co.uk

www.qbpartners.co.uk

Suitability Report Service

Comprehensive suitability reports are provided to recommend the most suitable solution for a client based on their circumstances and objectives. Suitability Reports can be provided for QROPS, QNUPS, International Annuities and other related areas of planning.

- ✓ Suitability Reports from only £750 for non-members.
- ✓ Recommends the most suitable jurisdiction and provider, together with recommended FX service and investment provider where applicable.
- ✓ Full due diligence pack available for the recommended provider.
- ✓ Online Service Platform from only £25 pm per adviser.
- ✓ 24 hour access to technical library, discounts on reports and online illustration tools, together with many other benefits.
- ✓ All covered by Professional Indemnity insurance.

Specialist Adviser Panel

QB Partners have established a panel of UK FCA regulated IFAs who have the appropriate qualifications and permissions to advise on international pensions, and estate planning, including situations where the client is resident overseas.

- ✓ QB Partners will communicate with client and introducing adviser.
- ✓ Advice fees are typically 3% up to £700,000 (min of £3,000, max of £10,500) and 1.5% over £700,000 (maximum £22,500).
- ✓ Introducer fees payable. Introducing adviser can choose whether or not to give ongoing investment advice.

We can also offer a Defined Benefit Service. Please contact the office for more details.