

NOMADPARAPLANNER.COM

# Service Guide

In this guide:

**ABOUT:**

**THE NOMAD PARAPLANNER**

**SERVICE:**

**HELPING YOUR BUSINESS**

**FEATURED:**

**6-STEPS TO BETTER REPORTS**

Engage &  
inform your  
clients.

# About



Nature at its finest:  
Doubtful Sounds,  
South Island, New Zealand, 2016

## The Nomad Paraplanner

Based from Javea/Xabia, Spain, I can provide remote and flexible paraplanning services for your business.

Let me know how I can help you by getting in touch.

Mark Underdown

## Above & beyond

- Clear, well-drafted and engaging client reports.
- Remote and flexible service.
- Great value.

**Looking forward to helping your business thrive.**

## Professional Study

- CISI Private Client Investment Advice & Management (distinction)
- CFAUK Investment Management Certificate
- CII J04 Pension Funding Options
- CII J05 Pension Income Options
- CII J01 Personal Taxation
- CII J06 Investment Principles, Market & Environment (merit)
- CII R01 Financial services, Regulations & Ethics
- IFS Certificate in Financial Advice
- IFS Certificate in Mortgage Advice & Practice
- IFS Certificate in Regulated General Insurance

## Key Facts

- Level 6 qualified.
- Wide range of experience.
- Cash flow and financial planning.
- DB Pensions.
- Trust investments.
- Offshore Investment Bonds.
- Discretionary investment.
- Portfolio management.
- Complex and technical planning.



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**Let Me Help Your Business**

A great value rate

# £35 Per Hour

We all know that finding a qualified, experienced and capable Paraplanner is tough; especially one that happens to live just down the road from your office.

Nomad Paraplanner can help form your core paraplanning service, take the strain from your existing team, or act as a go-to resource for those cases that are a little out of the ordinary.

**Discover the value I can add to your business.**

- ✓ Quick turn around times
- ✓ No commitment
- ✓ Level-6 qualified
- ✓ Widely experienced
- ✓ Great value
- ✓ Engaging reports
- ✓ Fixed case prices available

## 6-STEPS TO BETTER REPORTS

I've developed a 6-step approach to improving client reports:

### Readable

Does your report add clarity or confusion?

### Engaging

Will you hold your client's attention?

### Layout

Is your report well structured?

### Design

Does it communicate your advice effectively with visual appeal?

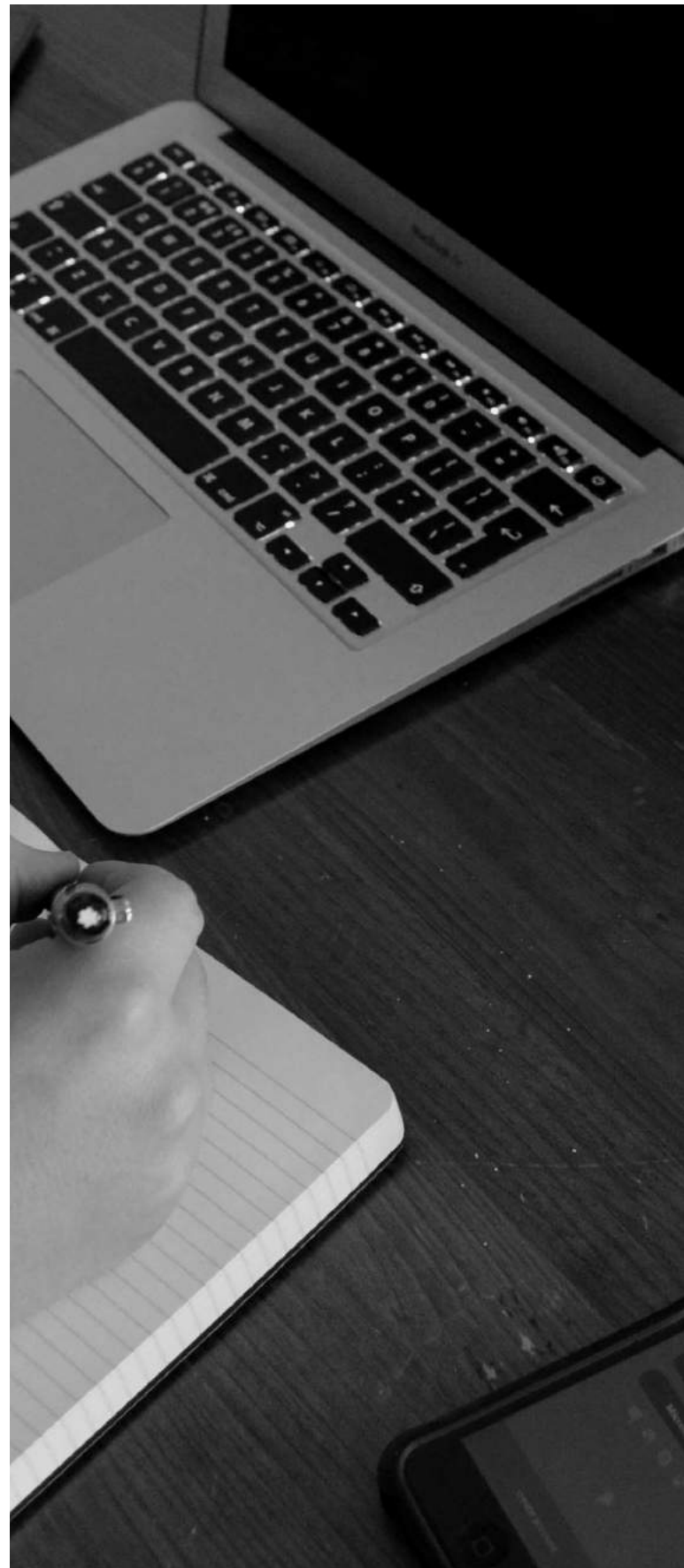
### Wording

Does it read like legal small print; or is it clear, concise and easy to understand?

### Compliance

Does it contain the correct information, disclosed in the appropriate way.

Read the guide at  
**Nomadparaplanner.com** or  
contact me for a personal review.



## Get in touch:

WEB:

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