

QB Partners are an independent specialist, providing technical, compliance and due diligence support to professional advisers. Qsteps is a natural extension of our existing services and will give advisers access to support with trust and estate planning from experienced and qualified professionals.



Qualified trust and estate planning service (Qsteps)

Qsteps will be delivered using the solutions based approach that advisers have become used to from our pensions support service, The QROPS Bureau.

Once we have discussed a client's circumstances and objectives with the adviser, the adviser will be asked to complete a fact find from which we can prepare a comprehensive suitability report, recommending the most suitable solution for the client.

This route suits advisers who wish to develop a capability to advise on trust and estate planning, whilst having the reassurance of ongoing independent support from an expert in the field.

For further information, please contact

Tel: +44 (0) 1624 661232

Email: enquiries@qbpartners.co.uk

22 Athol Street, Douglas, Isle of Man, IM1 1JA

www.qbpartners.co.uk

Suitability Report

Comprehensive suitability reports are provided to recommend the most suitable solution for a client based on their circumstances and objectives.

- ✓ Suitability reports from only £750 for non-members.
- ✓ 10% discount for members.
- ✓ Report outlines key planning considerations and tax implications.
- ✓ Recommends most suitable estate planning solution.
- ✓ Recommends most suitable provider, together with recommended investment provider where applicable.
- ✓ Full due diligence pack available for recommended provider.
- ✓ On Line Service Platform from only £25 per month per adviser.
- ✓ 24 hour access to technical library, discounts on reports and online illustrations tools together with many other benefits.
- ✓ All covered by Professional Indemnity insurance.

Once the recommended solution has been agreed with the adviser, QB Partners will offer ongoing support with implementation.

Order a Suitability Report

To order a report please either download from our website, www.qbpartners.co.uk or request the appropriate fact find document and email it to us upon completion at enquiries@qbpartners.co.uk

