



How Nexus works with retiring IFAs



Helping you achieve a successful transition
away from your advisory role

About Nexus

Founded almost twenty years ago, Nexus is a traditional IFA advising clients on their financial affairs just like you. As we've expanded in recent years, working with retiring IFA practices, we've retained our ethos of providing clear friendly advice, in a professional and unbiased manner to new clients.

We understand that clients are at the heart of all that we do and we focus internally on ensuring that all members of the Nexus team share our values.

We also realise that what makes a firm successful is you, the adviser, and so we also value your expertise and relationship with your clients.

Working with retiring IFAs

It's a fact of life that there will come a time when you want to step away from being a financial adviser. Whether you are thinking of fully (or even partially) retiring, Nexus specialises in helping advisers who are considering their options.

We understand that leaving a client bank and business that you have built up over many years is more than just a transaction. It's emotive. Clients trust you, they don't know any potential buyer.

In recent years, Nexus has grown not only because of the flexible options we offer retiring IFAs (we have successfully attracted over thirty IFA practices to date) but because we understand the sentiment involved.

If you're a number of years away from retirement then having an exploratory discussion (or a coffee) is absolutely fine. Many of the current ex-advisers we have spent a considerable amount of time looking at their options before proceeding.

Of course, if you feel you are a little nearer your retirement date then we can move further down the process and talk practically with you about becoming an advocate with Nexus.

Advocacy - some of the things we do & don't do?

We call advisers who have retired and are now with Nexus 'advocates'.

We do NOT alienate advocates from clients and the relationship you have had with them for many years. Why would we? Indeed we encourage the existing relationship to continue and be nurtured. As stated above it's you that has the trust.

Our preference is to pay retiring practices on a share of income basis for 10 years – this makes us distinctly different from most other acquisition firms. **This approach does NOT affect your ability to claim Entrepreneur's Relief.**

We have no central platform or our own funds so we are not into the game of immediately switching all your clients into a restricted solution. You may have noticed that that this type of shoehorning is something that the FCA have recently commented on.

What we do like is FUN. Advocates and partners are all invited to our annual Christmas party and we have regular additional events such as our golf and summer days.

Contact us

For further information on joining Nexus as an Advocate or Adviser, including our FAQs, please visit the 'Join Nexus' section of the Nexus website: www.nexusifa.co.uk/join-us.html

Alternatively, you can arrange to have a confidential chat with Director Phil Frapple, by emailing: office@nexusifa.co.uk

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