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NEXTGEN PLANNERS







THE ASHL ADVISER DEVELOPMENT ACADEMY

At ASHL we understand our part to play in the future of financial advice.

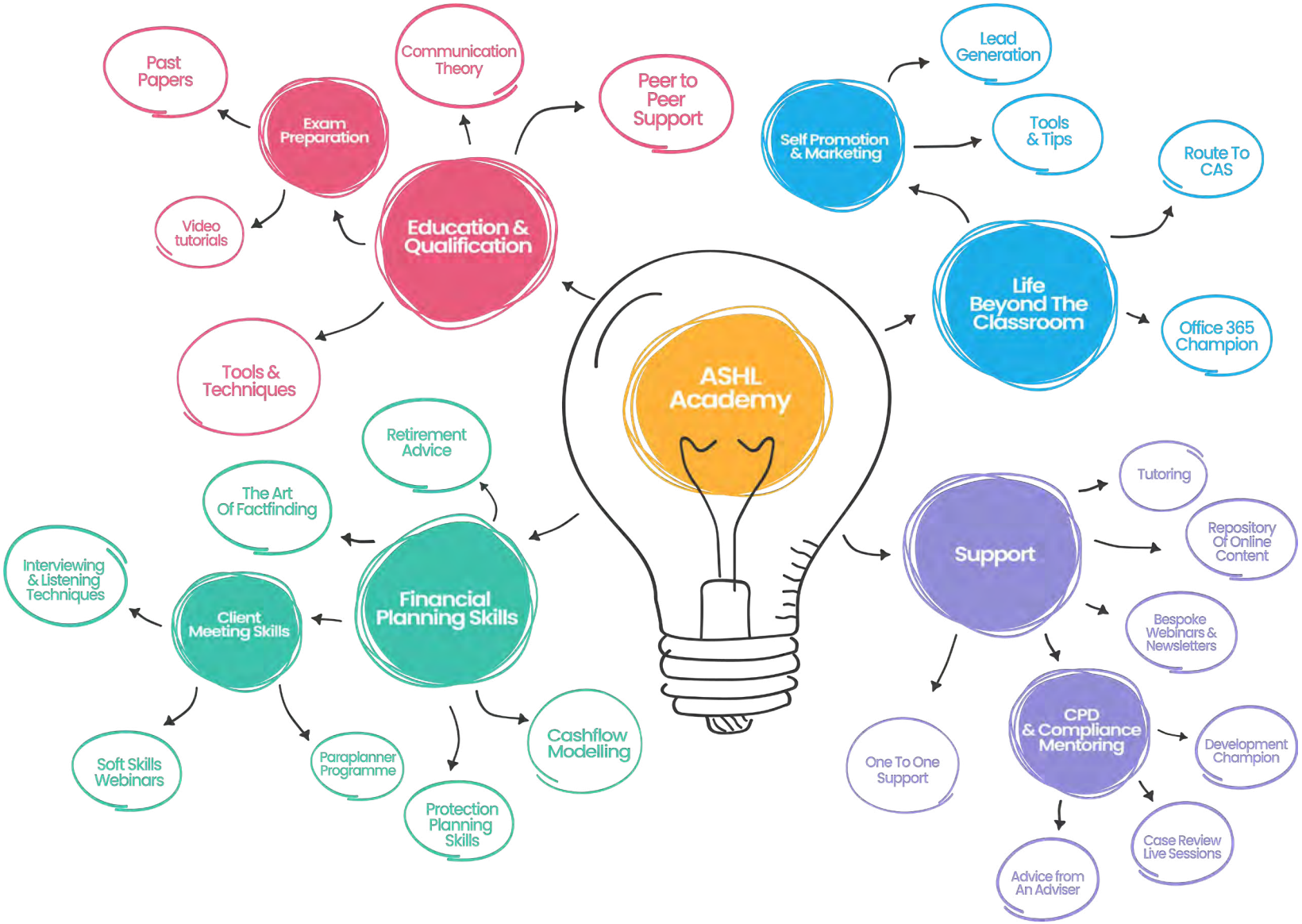
It is more apparent than ever that the current population of Financial Advisers is lacking youth, dynamism and diversity. We have listened to feedback from the membership which suggests that there is a growing need to deliver appropriate succession planning and exit strategies, to ensure the long-term security of your firm and your clients' future.

ASHL have partnered exclusively with NextGen Planners to design and deliver a training programme that is unique, bringing together the vision and industry leading compliance and support standards of the ASHL Group, together with the award-winning pedigree of NextGen Planners.

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NEXTGEN PLANNERS

DEVELOPING SKILLS BEYOND THE CLASSROOM





FUTUREPROOF YOUR BUSINESS

This is an opportunity to protect your firm's business model within ASHL and to ensure succession planning and exit planning is completed. Our proven track record gives you the reassurance that the training given is of an industry leading standard. With practical skills and an accelerated route to competency, the Academy offers more than just the qualification.

Depending on the chosen route of your employee, you as the employer will be able to grow your business and benefit from the expertise of a qualfied and trained individual. Whether that's as an administrator, paraplanner or qualified Financial Adviser.

COURSE MODULES

Highest possible value delivered to candidates and employers.

Simple, sustainable pricing structure.

Courses starting throughout the year.

Administrator

Programme includes:

- R01 Exam support including on demand video programme, weekly group tutorials, virtual classroom days, knowledge check question banks.
- FA1 exam support including on demand video programme and knowledge check question banks.
- Microsoft 365 Champion Certificate - 6 modules

Find out more

Paraplanner

10 virtual classroom days

- R01, R02, R03, R04, R05, R06
- Tutorial support covering J09
- 10 bespoke paraplanning modules
- Extensive on-demand content library
- 4 virtual classroom modules covering communication skills

Find out more

Paraplanner to Adviser

7 virtual classroom days

- Communication theory & negotiation skills
- Extensive on-demand content library
- CPD Programme

Find out more

Mortgage & Protection Adviser

3 virtual classroom days

- R01, CF6 and R05
- Extensive on-demand content library
- CPD Programme

Find out more

Financial Planner Level 4

- CII Level 4 Diploma in Regulated Financial Planning

or, CISI Investment Advice Diploma

or, LIBF Level 4 Diploma for Financial Advisers

+ Communication theory & Negotiation Skills

+ Extensive on-demand content library

Find out more

Fast track to Level 4

10 virtual classroom days

- CII R01, R02, R03, R04, R05, R06
- Communication theory & Negotiation Skills
- Extensive on-demand content library

Find out more

Bridging Programme Level 4-6

7 virtual classroom days

- CII AF1, AF4, AF5, AF8
- Advanced Communication theory
- Extensive on-demand content library

Find out more

Chartered Level 6

17 virtual classroom days

- CII R01, R02, R03, R04, 405, R06 AF1, AF4, AF5, AF8
- Communication theory & Negotiation Skills
- Extensive on-demand content library

Find out more

CII membership fee (optional), exam entries fee & learning materials not included

Study less **pass** more.

Our courses are underpinned by our 'Study Less Pass More' methodology, which helps candidates to drop inefficient study methods and optimise the learning process, blending knowledge sprint challenges with peer support groups, and virtual classroom days.

All of this is backed up with a comprehensive set of on-demand study materials. We have turned our experience of working with hundreds of candidates into a core methodology that helps candidates to spend their time in the most efficient way, maximising the chances of a first-time pass in each module.

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Sprint Challenges

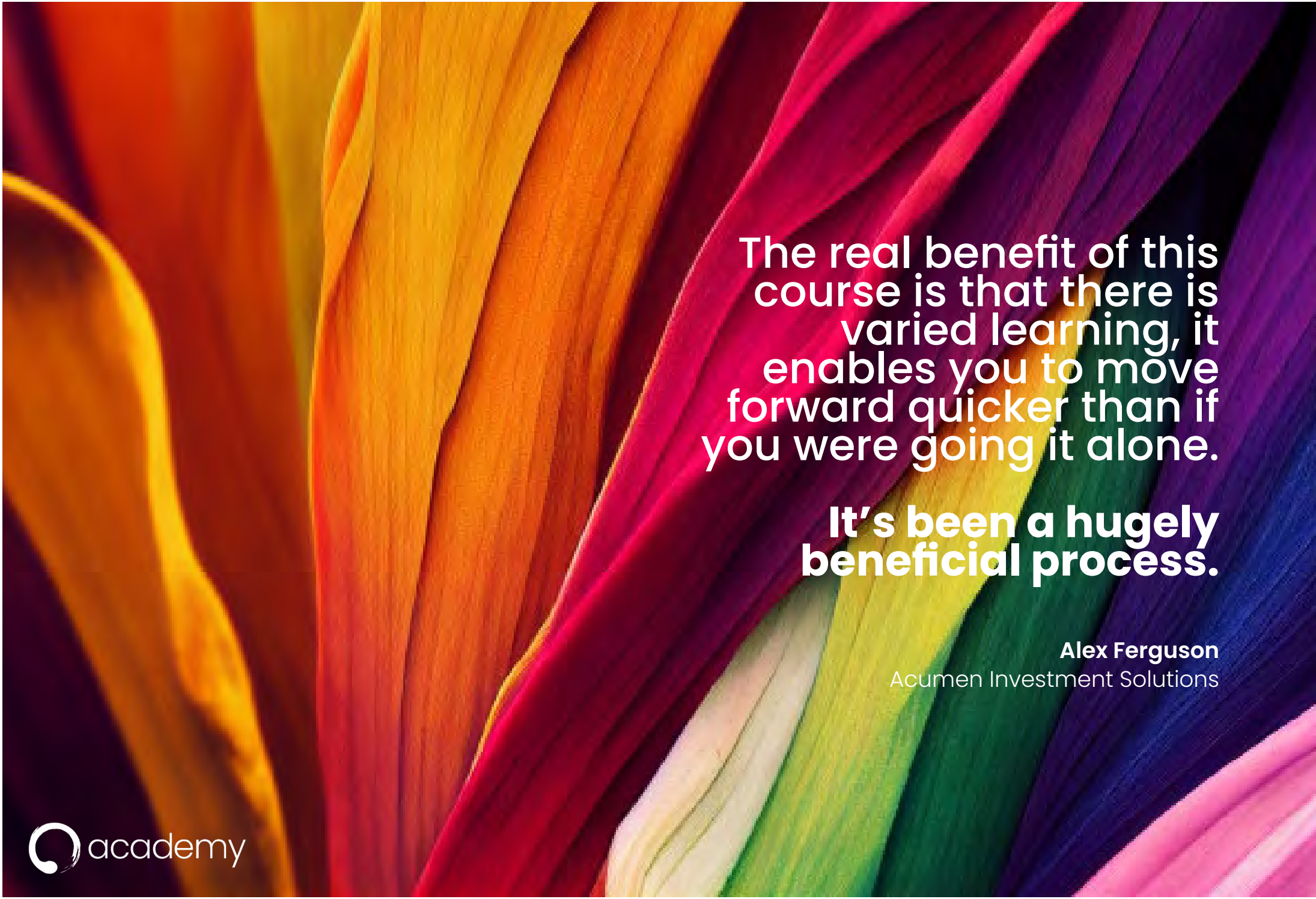
A 30 day challenge where candidates follow a timetable, with the goal of passing an exam within 30 days.

Peer Support Groups

Group forums between candidates on the same course, designed to encourage peer to peer engagement.

Virtual Classrooms

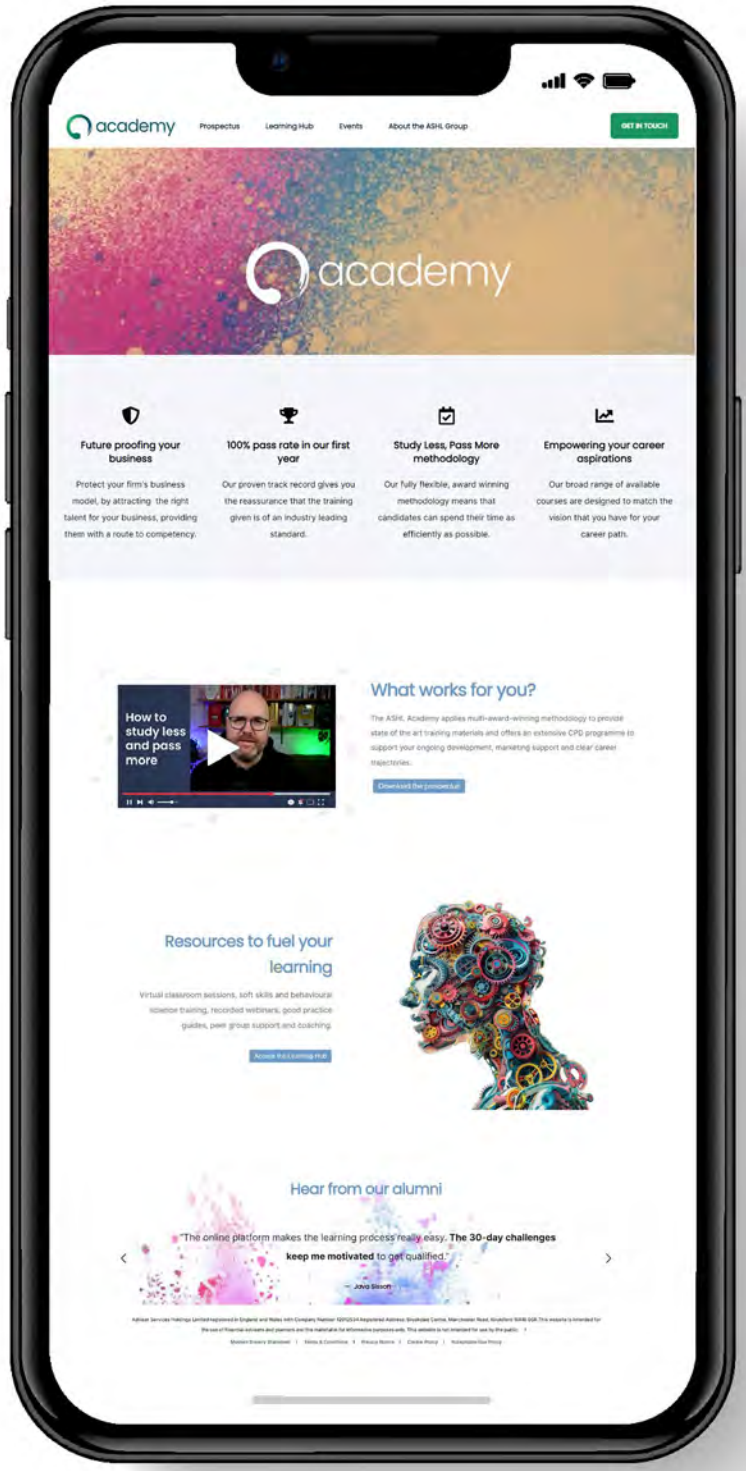
Online sessions with a tutor, who will answer questions and help candidates understand anything they need further support with.


The real benefit of this course is that there is varied learning, it enables you to move forward quicker than if you were going it alone.
It's been a hugely beneficial process.
Alex Ferguson
Acumen Investment Solutions
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A WEALTH OF SUPPORT

Education doesn't end at graduation...

The next step in our roadmap to building lifelong career opportunities for Academy graduates is to provide them with the tools and the knowledge to actively and confidently advise their future clients.






Learning Hub
Welcome to the ASHL Academy Learning Hub. Here you can dive into a wealth of insightful webinar content designed to empower your professional and personal growth.
Core Modules
Business Development
Compliance & Regulation
Introduction to Mortgage Fraud
Click Here
ASHL financial crime training
Click Here
Complaints & ASHL processes
Click Here
Mortgage fraud protection
Click Here
Meeting the compliance challenge
Click Here
Transitioning from performance to wellbeing maximisation
Click Here

COURSE OVERVIEW

Each course is built around developing the candidates' core technical knowledge, the skills required to be a financial planner, and the behaviours to create a sustainable career.

SKILLS

Traditionally, this area of learning in financial services was referred to as 'soft skills', but as the consumer and the profession has moved on, skills now need to be acquired across a much broader range. Our skills modules include communication techniques, negotiation, client acquisition and more.



BEHAVIOURS

At the core of the course are the behavioural modules. Candidates are challenged to create their own ethical code of conduct and are shown how this can be embedded into behaviours that build trust rapidly.

KNOWLEDGE & EXPERIENCE

We are confident that our sustainable methodology provides the technical foundations and the experience required for all Financial Planners, regardless of their choice of governing body.

FIRM
COMMITMENTS

- The firm must commit to supporting the candidates, with all one-to-one support that they may require outside of the programme.
- The firm must commit to releasing the employee for the appropriate number of hours relating to training and exams.
- The firm must commit to the ongoing support and development of the trainee.

ASHL
COMMITMENTS

- ASHL commits to supporting both the firm and the trainee whilst undertaking the training course.
- ASHL commits to ensuring that the course is relevant and up to date, ensuring that the course will add value to the firm and the trainee.
- ASHL commits to overseeing the delivery of the course, to ensure that the development of the trainee is completed and that any shortfall is rectified.

What do our graduates say?

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The website, the CPD videos, the modules, ***all brilliant!***

Kelly

I love the ASHL Academy *for the video modules and classroom sessions.*

Claire

It's really easy to revise on the fly*. It's ideal to be able to revise while grabbing a Maccies or a Starbucks, out on the road.*

Phillip

For me the ***bitesize videos are brilliant*** *and perfect for breaking down some of the more complex elements.*

Aaron

The online platform makes the learning process ***really easy****. The 30-day challenges keep me motivated to get qualified.*

Jaya

The ***recorded classroom days are very helpful****, they cover a great deal of content.*

Drew

Ready to go?



The programme is live, with onboarding happening throughout the year.

To register your interest in the ASHL Adviser Development training programme, powered by NextGen Planners, get in touch with us today on 01565 658 840, at academy@adviserservices.co.uk, or by searching @ASHLAcademy

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Prospectus



ASHL ACADEMY

Flexible learning, endless possibilities.

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NEXTGEN PLANNERS

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ASHL commitments

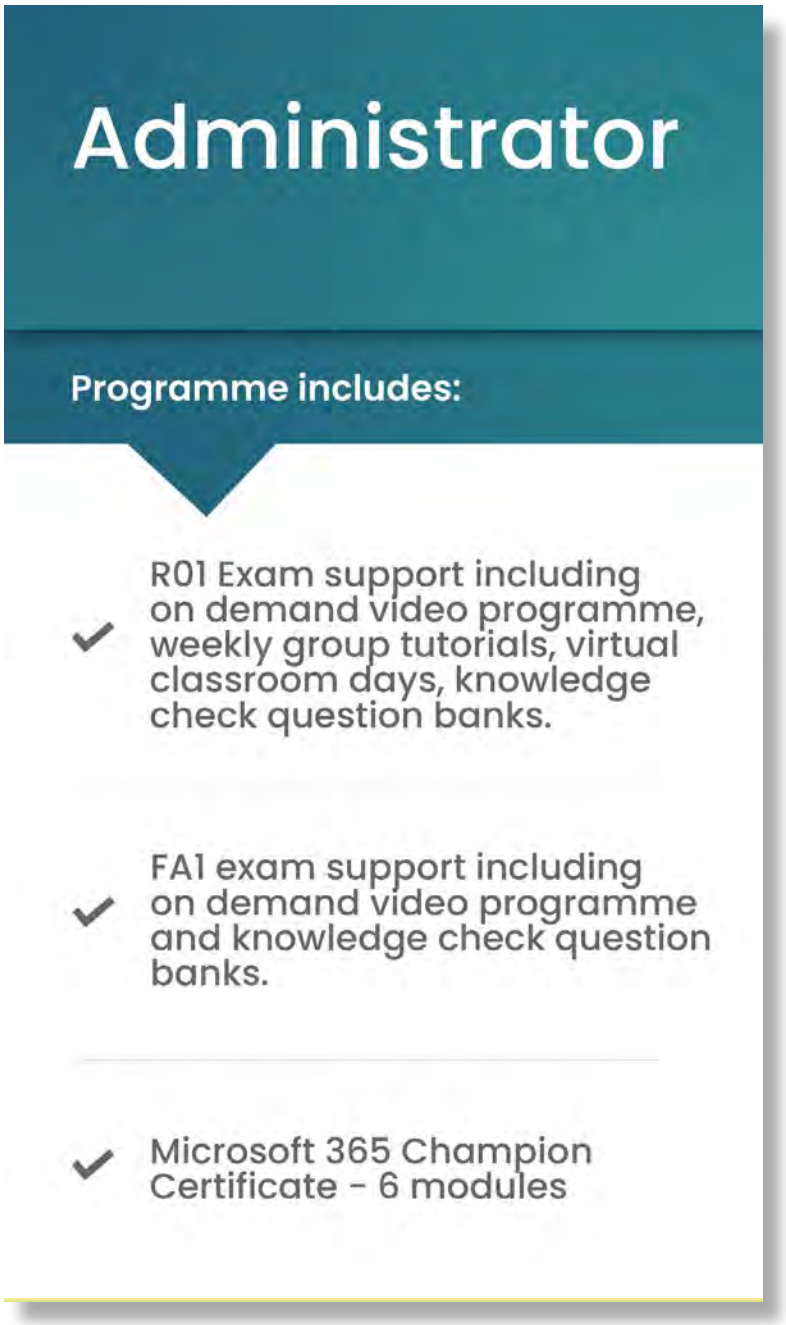
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Develop, qualify and train
for the career trajectory
that you envision.
The ASHL Academy Scholarship Scheme
Opportunity that lasts a lifetime.

The ASHL Group is immensely proud to champion the ASHL Academy Scholarship scheme, an initiative designed to empower an annual cohort of ambitious and motivated students from all ages and backgrounds.

The scholarship provides full access to the entire Academy Programme at no cost, while opening the door to meaningful, long term career opportunities across our trusted financial services network.

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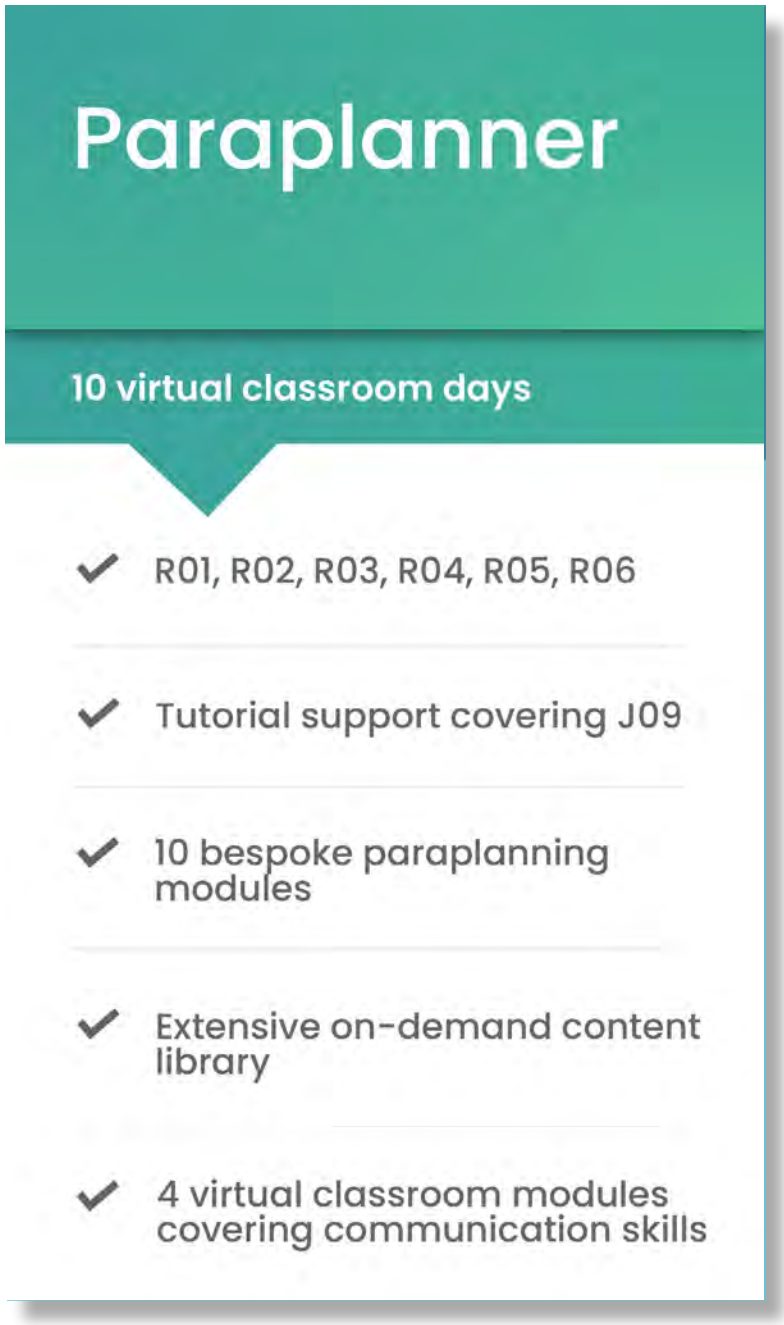


Your future role

Kick-start your career in financial planning and become an essential part of a business and their advice processes.

This is your opportunity to develop essential knowledge and skills needed to work in administrative roles within Financial Planning practices.

As a group that partners with Financial Planners and business owners across the UK, we are aware of how many of our members require staff members with this qualification, so that they can concentrate more time in other areas of the business. Having a key employee with these qualifications, business owners know that they are in safe hands with you handling operational and administrative tasks.



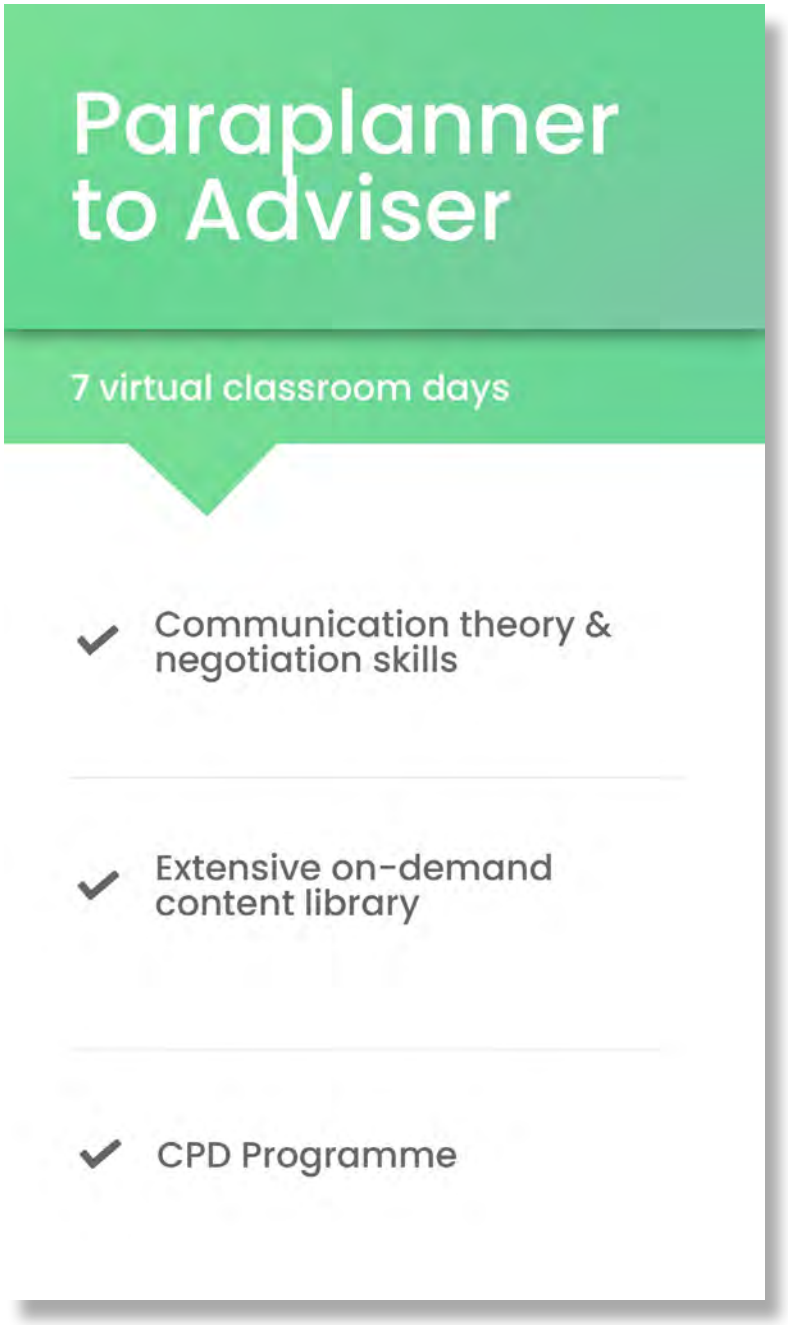
Your future role.

If you are new to the industry, if you've just graduated from University or if you are looking for an entry route into Financial Planning

....Look no further

This dedicated qualification route is designed to give you the expertise and technical knowledge needed to become a crucial member of staff within a Financial Planning practice.

Also, if it's in your career aspirations to become a Financial Planner, this course will give you the best possible head start.

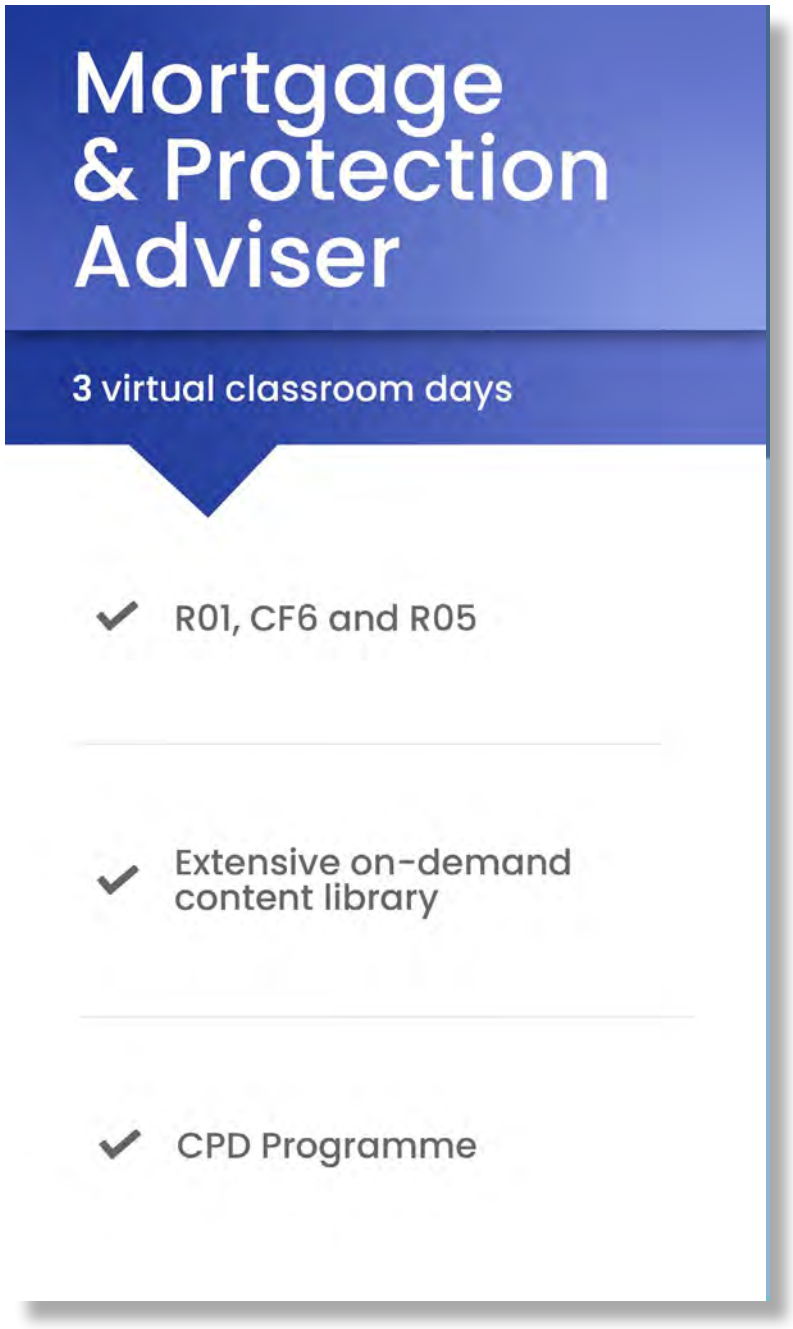


Your future role.

Ready to start providing direct advice to clients?

With the expertise you have developed in your time as a paraplanner, you have given yourself a fantastic foundation to flourish within the industry.

Now it's time for you to expand on what you've learned and to take the next step towards becoming a retail investment adviser.



Your future role.

For those who want do deliver the best possible service as a Mortgage & Protection Adviser.

As a Mortgage & Protection Adviser, you can advise a client on their mortgage as well as advising on the best way to financially protect them and their families.

Where some courses will split these into different qualification routes, we have consolidated it into one, to provide a platform that maximises your potential earning capacity and ability to deliver the best possible service to your future clients.

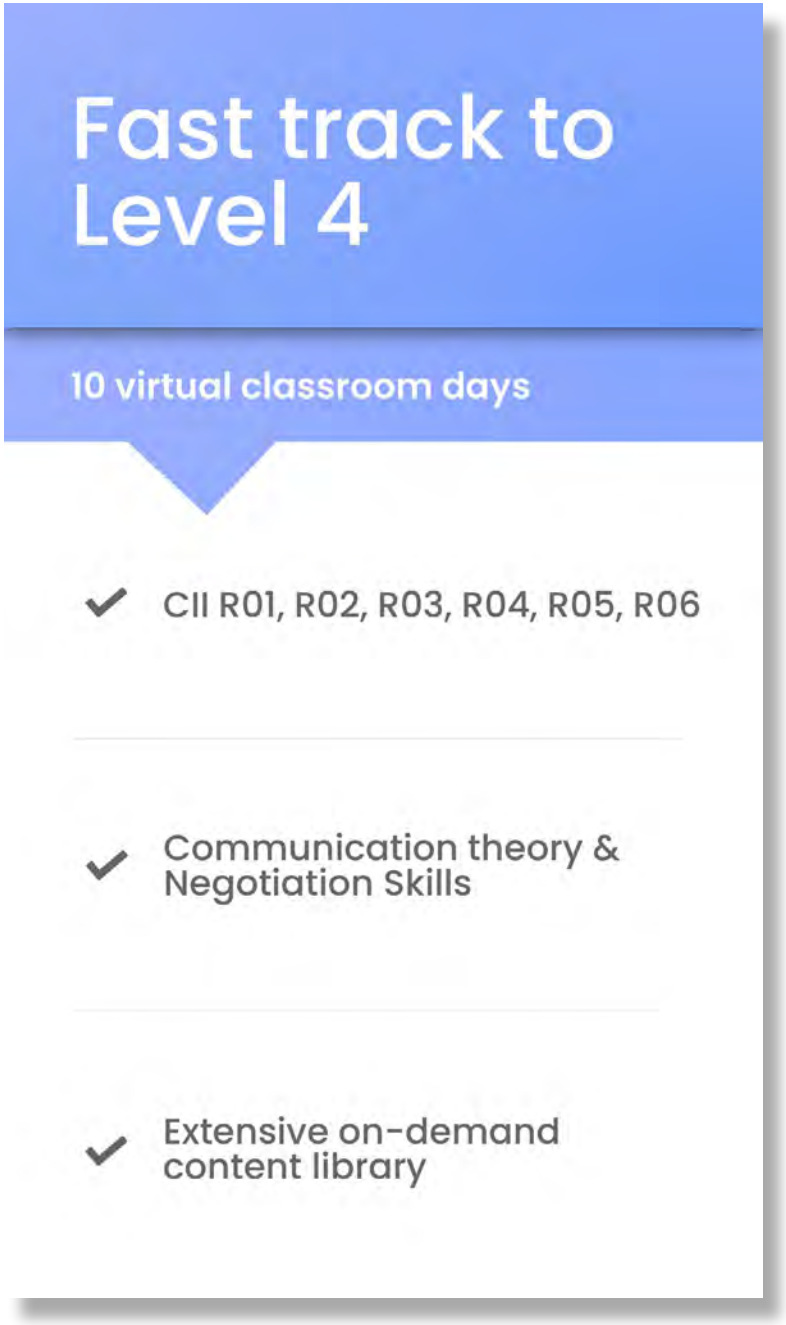


Your future role.

Looking for a flexible route to becoming a qualified retail investment adviser?

The Financial Planner Level 4 learning programme is designed for those who want to strike a balance between further education, work, family and leisure.

By taking the Level 4 Diploma in Regulated Financial Planning, you will meet the national requirements to advise as a retail investment adviser.

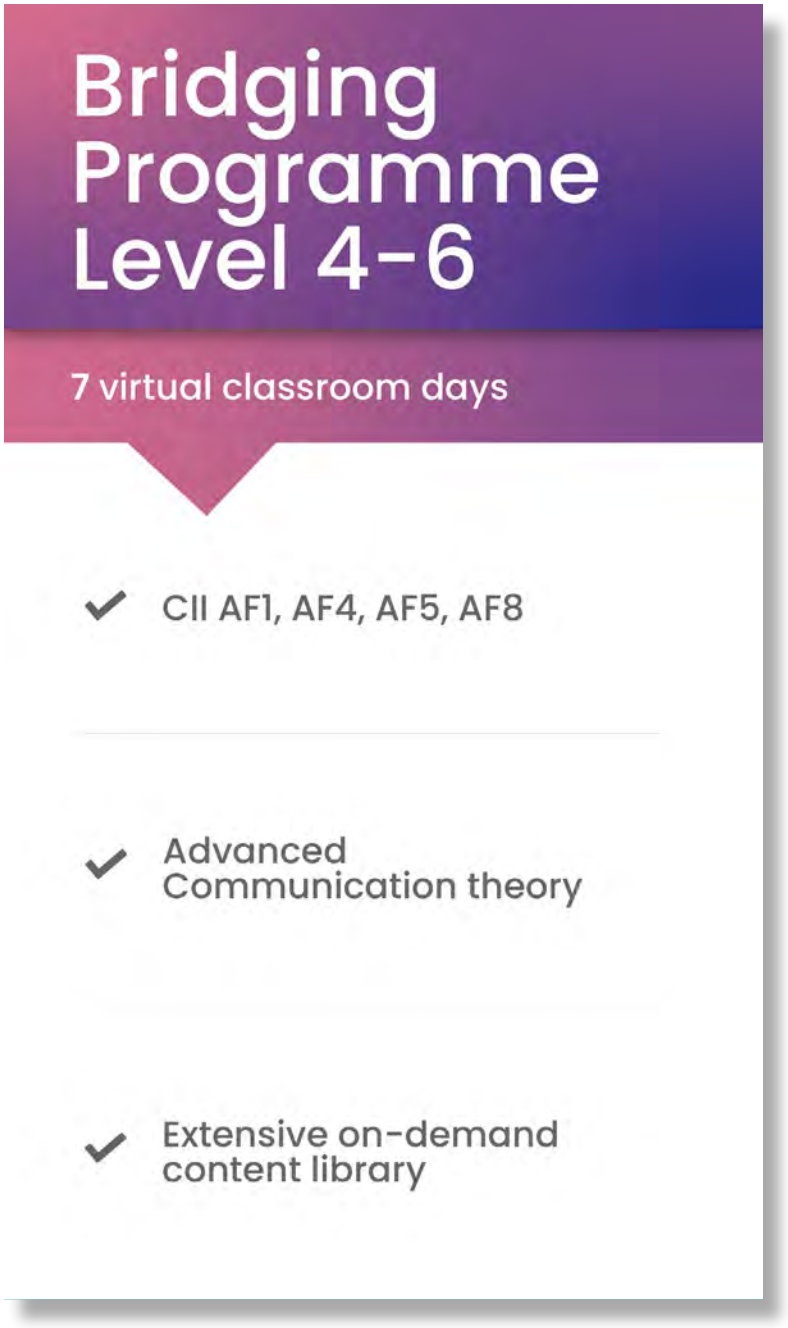


Your future role.

Are you a paraplanner or someone who supports a Financial Planner?

This programme is designed for those who are ready to take the next step towards becoming a retail investment adviser.

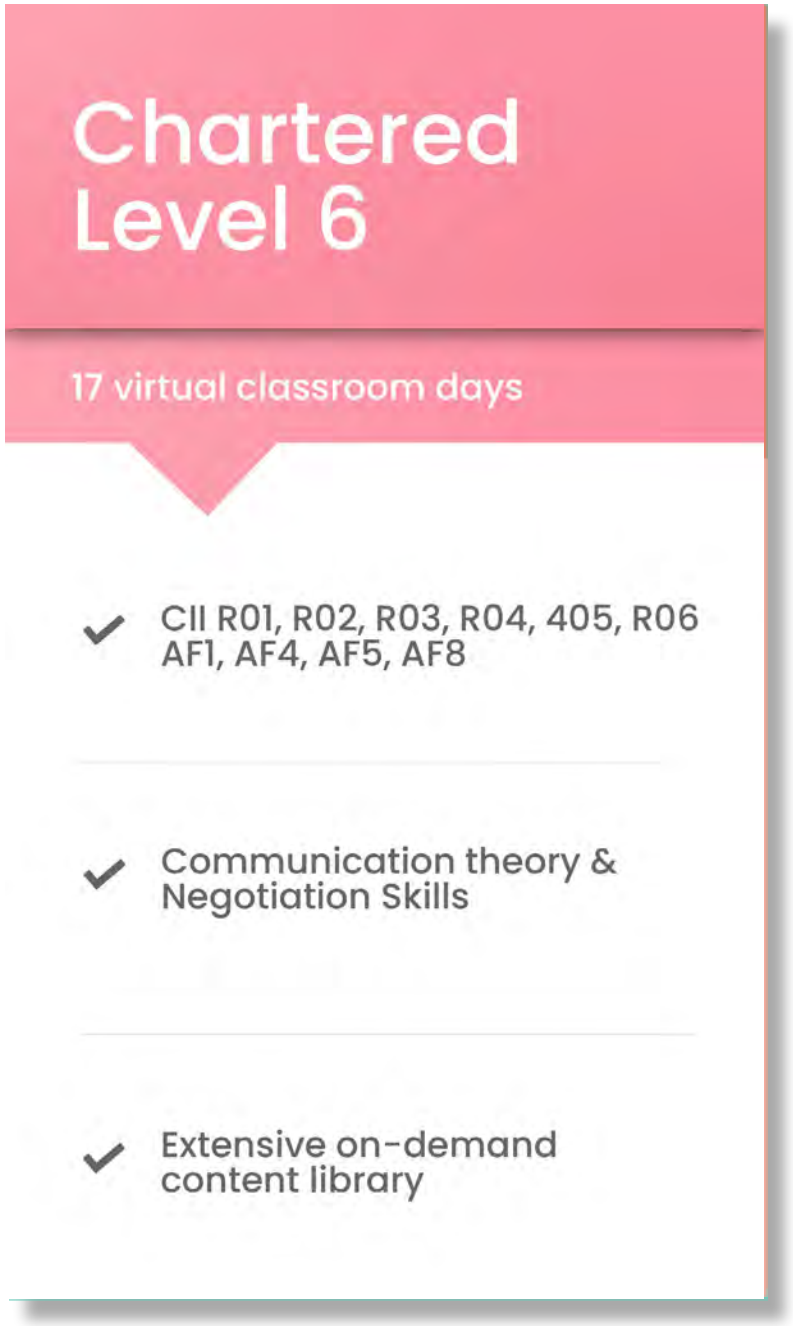
By taking the ASHL Academy Level 4 Diploma in Regulated Financial Planning, you will meet the national requirements to provide advice, in the most efficient way possible.



Your future role.

Ready to take it to the next level?

If you have taken your Level 4 qualifications through the ASHL Academy, or elsewhere and you are ready to take the next step to Level 6, the Bridging Programme is designed to efficiently support the next stage of your qualification journey.



Your future role.

Our most comprehensive course, combining the modules for Level 4 and Level 6.

The Chartered Level 6 programme provides advisers, or those in a support role, with a platform to develop specialist and sophisticated planning capabilities.

Chartered status is recognised industry-wide as a mark of trust and excellence.

FAQs

Why should I use this training?

The ASHL Training Programme is designed to provide everything an employer needs to take a high-quality recruit and development their skills, knowledge and behaviours to competence as a financial planner.

Through careful assessment and planning, we tailor each personal development plan to meet the needs of the candidate and the business that employs them.

The course is designed and delivered by learning and development specialists who have trained thousands of financial services professionals, and who care deeply about developing the next generation of professional talent.

What are the entry requirements?

There is no minimum entry criteria for the ASHL Academy programme. We will complete an assessment of each candidate prior to enrolment to ensure that they receive support tailored to their needs.

What support is there?

We provide 10 virtual classroom days during the Financial Planner level 4 course and 7 virtual classroom days for the Bridging Programme.

To get the best results, it is expected that employers will support candidates in attending these days, as well as supporting the candidates in their study and revision outside of this time, as the candidate will be working within the business.

FAQs

What if my employee leaves during the training contract?

Due to the linear nature of the course, if an employee leaves at any time prior to completion, we can offer a place to a substitute candidate.

When can I see the full course schedule?

We will arrange an introductory meeting with NextGen Planners, where we will discuss your candidates' individual course schedule.

What commitment is expected from the employer?

At the end of the course, most candidates will have passed all of the exams, completed the skills and behaviours elements, and will be assessed as competent financial planners at level 4, level 6, as a mortgage & protection adviser, or as a paraplanner. In the case of qualifying at level 4 or level 6, they will be in a position to apply for a statement of professional standing.

What if my candidate already has some of the qualifications?

Each candidate has their own personal development plan so we can adjust their timetable to reflect any qualifications they may already have. If your candidate already has all the qualifications they need, we have an alternative programme of skills and behaviours courses that you may want to consider.

FAQs

I have heard about apprenticeships, is there anyfunding available for this programme?

We considered the structure of the ASHL Academy programme carefully, and one of the areas we looked at closely was apprenticeships.

Though there are some very good apprenticeship courses available, there are some significant restrictions that come with the apprenticeship funding.

As a result, we wouldn't have been able to deliver a programme that achieved the breadth of content, employer and candidate centred environment, and volume of soft skills content that we believe is vital in the development of the next generation of this profession.

In addition, with apprenticeship funding under review annually by the government, it is impossible for us to commit to a long-term programme through this route.

We wanted to design and deliver a programme without compromises and the apprenticeship funding option and resulting restrictions crossed too many of our red lines.

When does the course start?

The ASHL Academy programme focuses on CII exams as they are the most widely used and recognised in the profession.

FAQs

What are the benefits of going through the ASHL Academy, rather than going through NextGen directly?

Sense and Lyncombe network members will receive the learning courses at no cost, meaning that the only thing you need to pay is examination body membership fee (CII, CISI etc) and the cost of your examinations.

This ensures that you have the technical support of NextGen and networking and marketing opportunities with ASHL, who will promote your journey and successes through our various communication channels and provide a platform for discussion between graduates.

How is training delivered?

Training is delivered through a combination of methods:

- Virtual classroom days
- Podcasts
- Recorded webinars
- Good Practice
- Guides and Videos

What are the 10 on demand modules for Paraplanning?

As a Network model, we are able to negotiate bulk discounts for our The modules cover key paraplanning skills. Including, researching the market and choosing a suitable solution, CIPs and provider due diligence, preparing for an annual review, writing reports and financial plans.

FAQs

How much of the course is dedicated to passing exams?

There is no getting away from the fact that in order to become a financial planner, you need a licence to trade and that comes in the shape of an SPS from a professional body.

Therefore, the course is designed to help candidates pass each of the exams first time. However, we believe that technical knowledge is just the foundation in becoming a great financial planner, so the course focuses heavily on skills and behaviours, with virtual classroom sessions, as well as podcasts, and webinars.

What if I have to take time off?

We understand that there will be times when candidates won't be available and we will do everything possible to accommodate extended periods of absence.

What should I buy from CII?

The ASHL Academy programme does not include the exam entry fees or study material costs from CII. Each module from CII is priced individually and can be purchased as an exam entry only or with study guide and additional support material from RevisionMate.

FAQs

Do I have to book in every classroom day at once?

We understand that juggling work and study can be challenging, which is why our training programme is designed to be flexible, allowing you to fit studying around your work commitments.

Our expert trainers are on hand to provide guidance and support throughout your journey, ensuring that you have all the tools and knowledge you need to succeed.

What is the split of of the classroom days for R01 - R06, for the paraplanning programme?

We have increased our support for the level 4 candidates in the programme. We now offer 10 virtual classroom days for the level 4 contract covering the following:

R01 –2 days
R02 –2 days
R03 –2 days
R04 –2 days
R05 –1 day
R06 –1 day

What is the split of the classroom days for AF1 -AF8?

For the courses to level 6:

AF1 -2 days

2024 Prospectus



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Flexible learning, endless possibilities.

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