

PRESS RELEASE

18 July 2011

Sesame Bankhall Group launches legal services proposition

Sesame Bankhall Group is launching a new legal services proposition to help members of Sesame, Bankhall and PMS to strengthen relationships with clients by enhancing their range of services.

Sesame Bankhall Legal Services will equip advisers with the tools to assist in the legal protection of their clients' wealth and help to manage a range of complex legal issues that advisers and their clients encounter as part of lifelong financial planning. No additional qualifications are required for advisers to undertake this work.

The service will initially focus on conveyancing, with further phased developments taking place that will provide all-encompassing client wealth protection services, including will writing, trust deed production, probate, estate and trust administration, powers of attorney and the provision of other legal advice required by clients and their families.

The first of the legal services to be rolled out today provides advisers with access to four of the UK's leading conveyancing solicitor practices. These firms have been chosen based on their expertise, financial strength and technology capability.

The conveyancing service will enable adviser firms to refer cases using an efficient automated process. Advisers and their clients have access to a dedicated case handler and can track the progress of cases online, by email and text message. Marketing support is available and advisers can earn market leading referral fees for a completed sale or purchase. If an adviser firm makes sufficient referrals they will also be eligible for an iPad.

Sesame Bankhall Group is developing its new legal services proposition at a time of large-scale change in the legal profession. The group has chosen partners who it believes will survive and thrive in the new environment. This will ensure that adviser firms are not threatened by dealing with law practices who may struggle in the future.

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George Higginson, Chief Operating Officer at Sesame Bankhall Group says: “This proposition is all about giving advisers the tools they need to provide quality advice to their clients and their clients’ families. Professional financial advisers already have high approval ratings with the general public and we believe that can be enhanced further by using these services. Our goal is to place advisers at the heart of their clients’ financial and legal advice needs.

”Assembling a panel of top solicitor firms with in-depth knowledge and experience of the conveyancing market represents the first phase of our new legal services proposition. These firms have met stringent due diligence criteria and we will continue to monitor them to ensure they are delivering a quality service to our members and their customers. This is another example of how we are using our scale to deliver new best of breed services that help members of Sesame, Bankhall and PMS to look after their clients’ needs.”

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Further media enquiries

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About Sesame Bankhall Group

Sesame Bankhall Group operates three distinct distribution brands.

- Sesame is the UK’s largest appointed representative (AR) network with 1,400 member firms.
- Bankhall is the market-leading support services business for 1,900 directly regulated IFAs.
- PMS operates the largest mortgage club for directly regulated mortgage brokers in the UK.

Services provided include compliance and regulatory support, access to one of the UK’s most comprehensive training and development programmes, in-depth product research, preferential PI terms and access to the latest technology to enable advisers to write business more efficiently.