

# HNW & BUSINESS PROTECTION

## SYNDICATED RESEARCH STUDY

All businesses have one thing in common – the importance of the people that make them tick. This is regardless of whether we are talking about a small start-up or a large multi-national business. So how much would it cost a business if certain staff are sick or unable to work?

But yet we consistently see how this element of financial planning, while seen as a cornerstone of good planning, shows business levels way below where they could and should be.

So the question is how to help advisers do more of the protection business that would so clearly benefit both them and their clients.

In particular we assess:

- The role protection currently plays in adviser firms;
- How advisers ascertain which providers to place business with;
- The standard to which providers are currently delivering;
- The forms of service and support that will most help; and
- What can be done to help maximise opportunities in the protection market.

We will point clearly to how you can tailor propositions, services, support and communications to help secure business.

## DELIVERABLES



100 DEPTH  
INTERVIEWS  
WITH TARGET  
ADVISERS



ONLINE  
SURVEY OF 500  
CONSUMERS



FULL  
REPORT



FACE-TO-FACE  
DEBRIEF





USE OF DATA FOR  
COMMS / PR SUPPORT


Put starkly – in 2017 only **32%**  
of advised clients that  
advisers believe should have  
cover in place, do.

### FOR DETAILS PLEASE CONTACT


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