SUCCESSION

EMPLOYEE BENEFIT SOLUTIONS

Plan for the future, plan for success

At Succession Employee Benefit Solutions Limited, we are here to help you successfully implement employee benefit strategies that will lead to higher employee job satisfaction, higher job retention, and help attract the right new members for your team.

The path to a successful employee reward package is different for every client. That's why we tailor our services around employee needs, objectives and your budget.

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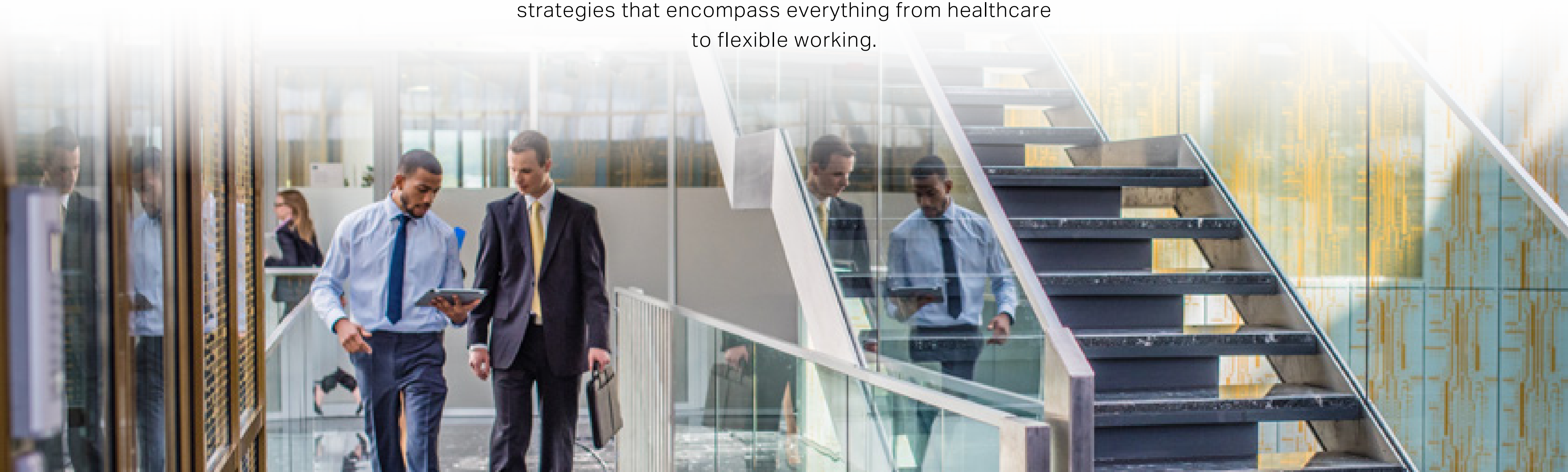
WELCOME TO SUCCESSION EMPLOYEE BENEFIT SOLUTIONS

Succession Employee Benefit Solutions is a specialist employee benefit consultancy firm. Founded in 2017, our principal aim was to build a financial planning firm specialising in employee benefits, unrivalled in expertise and unmatched in the level of service on offer.

We are a national business. Our dedicated employee benefit consultants and operational staff are located the length and breadth of the United Kingdom, supporting hundreds of employers to better understand their workforce, by implementing employee benefit strategies that encompass everything from healthcare to flexible working.



OUR TEAM

The Succession Employee Benefit Solutions team is highly skilled and never loses sight of what our clients need – exceptional levels of service and expertise.

The team consists of

BENEFIT CONSULTANTS

MANAGERS

PLANNERS AND ADMINISTRATORS

HOW WE HELP – OUR SERVICES

We offer bespoke benefits advice according to your requirements, across the entire range of employee benefits.

BENEFIT SOLUTIONS

- Pension Consultancy (including annual scheme governance)
- Auto-Enrolment
- Scheme Discontinuance
- Salary Exchange Consultancy and Support
- Defined Benefit Scheme Trustee Advice

RISK & HEALTH BENEFITS

- Group Life Assurance
- Group Income Protection
- Group Private Medical Insurance
- Cash Plans
- Group Dependants' Cover
- Dental Plans
- Employee Assistance Programme
- Group Critical Illness Cover
- Travel Plans
- Voluntary Benefits
- Flexible Benefits

OUR CLIENT EXPERIENCE

We build meaningful and trusted relationships with the businesses we work with, developing bespoke employee benefit and remuneration packages to suit your unique objectives.

We place our clients at the heart of everything we do at Succession Employee Benefit Solutions, and clients trust us because we deliver outstanding advice and exceptional service with confidence.

FEES

When it comes to fees, we like to keep our approach straightforward, and focused on those things we know matter to our clients. So we prioritise transparency, value and simplicity.

VALUE

Our fees are structured fairly, and reflect the value we add to our clients' benefit programmes.

TRANSPARENCY

We know you want to clearly understand what you are going to be charged, when you will be asked to pay, and what you can expect to receive in exchange.

All our initial and ongoing fees are discussed with you at the start of your journey, to ensure complete transparency and clarity.

SIMPLICITY

We realise you don't want to face confusing charges and complex tables. You just want to know what you are going to be charged. Your first meeting with us comes with no obligation. Here, we will gain a good understanding of how we can help you and what services you may require. We will also discuss our fee structure with you, explaining everything simply and clearly.

OUR SERVICE LEVELS

We understand that not every client requires the same depth of ongoing services from us. Once we've provided our recommendation to you, we can agree an ongoing service that is appropriate to your business's circumstances.

Whichever service level we agree is needed, we will ensure that as part of the ongoing service we will review your position annually, to find out if there have been any changes that could affect your plans, or potential amendments that could be made to them.

For information about ongoing services and our related fees and charges, please get in touch with us via email at **info@sebsltd.co.uk**.

SPECIALIST SERVICES

In addition to our employee benefit services, we have other specialist teams that may be able to support you.

FOR INDIVIDUAL FINANCIAL PLANNING NEEDS:

Succession Wealth Management Limited offers a sophisticated assessment of individual financial ambitions, including views on risk and key financial milestones, and can deliver a bespoke financial plan with tailored recommendations.

Succession Financial Management Limited provides mortgage and individual protection advice, combined with a restricted investment service.

If you would like further information on any of these additional services, please let us know, and we will put you in touch with the relevant specialist.

FOR CORPORATE CLIENTS WORKING WITHIN THE INDEPENDENT SCHOOLS SECTOR:

Succession Independent Schools offers consultancy and planning support for those working within the education sectors, not just independent schools. They can assist corporate clients, individuals and organisations' representatives navigating the Teachers' Pension Scheme rules, pension legislation and taxation.

OUR APPROACH

It’s our job to support your business in meeting both its regulatory and employee obligations, and to create tailored solutions to help you reward, retain and recruit the team you need.

We do that by focusing on what’s important to you, fully understanding your evolving aspirations, and building appropriate solutions.

WHAT WE CAN DO FOR YOU

Client feedback has been instrumental in the development of our services. Most employers want to keep control of expenditure, and at times are forced to implement legislative changes on a limited budget. We have designed our services in line with our clients' feedback, and trust we have a solution that meets most clients' budgets. Our Employee Benefit Consultants are always available to discuss options and support.

OUR INITIAL MEETING

We offer an initial meeting to discuss and understand your current benefits, objectives, and how we can assist you going forward.

A typical meeting will cover discussing your requirements, gathering information necessary to provide a review and recommendations based on our findings, and agreeing a timeframe and scope of the project, should you wish to work with us.

We record all this information on a factfind document, which is available to you and will provide you with meeting notes covering our discussion.

EMPLOYEE COMMUNICATION

Effective employee communication is critical to the success of your benefits package. We will help you develop a suite of engaging documents in plain English; as a minimum, an information pack detailing available employee benefits, what they mean to employees, when they become available and how to access them.

Employees can also be invited to a staff presentation, where they can learn about their benefit package and ask any questions they may have. These group presentations are designed to explain the benefits of joining the company-sponsored benefit schemes, and are an ideal method of delivering a clear message in a quick and cost-effective way.

ONGOING SERVICES

Reviewing your benefits can be a critical part of our service, depending on your requirements. If appropriate, we will recommend you engage with our ongoing services, which includes an annual review. This meeting is designed to bring everything together, looking at your strategy and the success of your benefits structure. It is an ideal time to map out any additional support for the following year, and any essential changes that must take place to your benefits.

As part of our review, we'll discuss updates that could be made to your pension, risk, health and wellbeing benefits, changes in legislation that might affect your scheme(s), and the effectiveness of your employee communications

OUR PURPOSE, VISION AND VALUES

Everything we do at Succession Employee Benefit Solutions Limited is guided by our Purpose, Vision and Values, all of which have been carefully considered and crafted to put the client at the heart of our business. We work as one team, working closely together so that our clients gain from our collective knowledge and expertise.

OUR PURPOSE

To build meaningful, long-lasting relationships with our clients, and add value to their businesses and the lives of their employees, through our six-step employee benefit solutions process. This can only be done by getting to know our clients and their goals.

OUR VISION

To be the trusted adviser of choice. We strive to create relationships built on trust, so our clients feel they are in safe hands. To realise our vision, we consistently focus our efforts on delivering quality advice and an excellent client experience.

OUR VALUES

As we put our clients at the heart of everything we do, it's only right that we embed **CLIENT** into our values:

Client focus

We always act to support and benefit our clients.

Long term

Our financial plans are built based on individual needs, but always aiming for long-term financial confidence for our clients.

Integrity

Our work and decisions are always conducted with the utmost integrity.

Efficiency

We continuously evolve what we do, with the aim of meeting, and exceeding, our clients' expectations.

Nimble

Our strategic thinking, processes and leadership are nimble and effective, to the benefit of our clients.

Teamwork

We believe that working together across our talented team, enables us to deliver quality advice backed up by an excellent client experience.

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If you have any questions, or are seeking more information, please don't hesitate to get in touch with us, via email at

info@sebsltd.co.uk or call us on

Glasgow Office – 0141 225 3878

Birmingham Office – 0121 212 9212

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