

Transition into a fee based network such as OpesFidelio

You should be able to answer the following questions positively and then consider how to implement your transition:

	Answer	Action
Do you have at least £2 million of existing client funds?		If you do not, then you will struggle to break even in the first year and so you may wish to consider this
Are you planning for the future being over 5 years?		If not, then you must consider what you are trying to do
Do you want a business model which you own and has value for you to be able to sell?		If not, then continue to work for someone else would be our advice
Do you wish to feel part of a team rather than working for a network?		This is a key part of OpesFidelio. The team will help you write business that you may have previously missed
What companies do you need to transfer servicing rights to for your clients?		Provide this list to your OpesFidelio representative before you move as we need to ensure we can obtain terms of business
Do you wish to remain part of another network?		If the networks permit it then you may, BUT you will not be covered by OpesFidelio compliance, nor PII and the network will have to deal with complaints and the client must be made aware that it is a different network otherwise you are breaking your contract.
Do you wish to have your own agencies with some companies		If the companies permit it then you may, BUT you will not be covered by OpesFidelio compliance, nor PII and you will have to deal with complaints direct on these agencies and the client must be made aware that it is a different network otherwise you are breaking your contract.



The Next Step



Give us a call on **+44 207 993 5453**
or email us at **contact@opesfidelio.eu**

Putting you in
control