

# OpesFidelio Benefits

## We asked our existing advisers

### “What are our key benefits in your eyes?”

Below is a selection of the answers we received:

- OpesFidelio has helped us build a business based on real value as we received immediate passive income on current and all new investment business
- We love the simplicity of the online fact finds and risk questionnaires
- Our clients immediately recognised the additional benefits of the Portfolio service and the regular contact with investment reports has led to greater interaction and referrals.
- We found it easy to transfer existing business into a tried and trusted Business Model but you have to have the agencies set up first which can take time
- Our clients liked the idea of transferring into the active service with the opportunity of lower charges supported by expert fund selection.
- Charges for clients are fair, transparent and not a significant drag against investment performance
- Our clients with larger assets are attracted to the ethos of putting client outcomes and service first with no product bias
- We like the idea of Professional Indemnity Insurance for regulated business linked with the UK
- We have been able to set-up some agencies in our own name which has been useful as we are paid direct
- 100% retention of our earnings! Our costs have reduced but our clients now have more support
- Knowing the fixed fee is taken each month without any action needed.
- Win-Win for our clients and ourselves
- We're encouraged to work towards and achieve the highest level of technical qualifications
- We now have a proper Exit Plan in 6 years time.

“OpesFidelio members are supported in order to deliver higher levels of service at significantly lower cost through our Membership Structure”  
**Shane Wood**

## Summary

By working together, we are building a special Brand. Part of this is achieved through fair transparent charges levied on both our members and their clients, and also through professionalism. The OpesFidelio partnership provides you with compliance support, access to specialist expertise and full due diligence. Not only can your clients be better off but so will you with higher net earnings, increasing passive income year on year and the opportunity to build a high value business with an Exit Route if required.



Putting you in  
**control**