

Changing the nature of financial advice

The political environment, technology and a changing society are all challenging the way that financial advisers do business. Traditionally working on a transaction basis, where services were provided free to clients, IFAs are slowly making the transition to a fee-based service. FP Advance, an industry leading provider of consultancy and training services in the field of transition planning, is working with online learning developers Nelson Croom to create an interactive elearning programme to expand the reach of its training.

"The shift in business focus can be daunting for IFAs. We help people make this transition and give them the confidence they need to make the change and make it smoothly. We approached Nelson Croom because of their expertise in transforming specialist and technical content into an engaging experience for the learner. The process for creating the prototype has run very smoothly, and I'm pleased to say it looks great and really captures the spirit of what we do" comments Brett Davidson, Chief Executive, FP Advance.

The FP Advance Transition Toolkit provides learners with a sound understanding of how to build and maintain a successful fee based financial services business. It provides learners with course materials that allow them to implement changes in their business and feel they have the ability to make the transition. The online Toolkit enables FP Advance to make training available on a continuous and widespread basis and provides an independent and objective learning resource for the IFA community that is not tied to any product-selling company.

"We are excited to be working with FP Advance, which was recently identified as the number one provider of transition training for IFAs. Our challenge is to create an online learning experience every bit as transformational as the face to face training FP Advance has rightly been lauded for" comments Alan Nelson, Managing Director, Nelson Croom.

The FP Advance Transition Toolkit will consist of seven modules. The first module releases as a prototype in April.

ENDS

Notes for editors:

About Nelson Croom

Founded in 2000, Nelson Croom has rapidly grown into a leading developer and publisher of online learning. Nelson Croom works in partnership with professional associations, companies and voluntary organisations to provide flexible, relevant and creative CPD, training, distance learning and compliance programmes. For more information visit www.nelsoncroom.co.uk

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