

# broadbench

## Rewarding Partnerships



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# Who we are

**At Broadbench, we specialise in delivering expert regulated financial advice to contractors, business owners and senior professionals.**

Our partners include:

- Accountancy firms
- Contractor & freelancer platforms
- Recruiters & contractor networks
- Professional communities (clinicians, directors, consultants)

This guide provides:

- A clear overview of the partnership process
- Commercial and remuneration opportunities
- Marketing support available to partners
- Examples of how partnerships deliver value

## Legal & Compliant

Broadbench is authorised and regulated by the Financial Conduct Authority (FCA). We ensure:

- Advice is fully compliant
- Suitability documentation is produced
- Data protection and GDPR are upheld
- Client confidentiality is protected

# Why Partner With Us?

Many professionals seek specialist financial advice but:

- Their existing provider does not have regulated permissions
- Advice is often generic or incomplete
- They seek mortgage solutions that traditional lenders struggle to provide
- They need tax-efficient protection solutions aligned with business structures

By partnering with Broadbench, you can:

- Expand your value proposition
- Retain and strengthen client relationships
- Provide regulated advice without operational burden
- Unlock a revenue-share or enhanced remuneration model
- Access specialist marketing and educational resources

## Typical Partnership Outcomes

- Improved client satisfaction
- Higher member engagement
- New revenue streams
- Increased perceived partner value
- Stronger long-term relationships
- Low operational overhead



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# Who We Work With

## Accountancy Firms

You advise on business performance, tax and compliance. Your clients ask about protection, structuring and mortgages, but you can't advise on regulated financial products.

Broadbench provides specialist, regulated advice while you remain front of house.

Benefits:

- Maintain client trust and continuity
- Expand service capability
- Earn referral or revenue-share income

## Recruiters/Umbrella Companies

Contractors often ask recruiters how to manage:

- Mortgage challenges
- Insurance
- Business risk planning

Broadbench fills this gap with regulated, professional advice, protecting both the contractor and your reputation.

## Contractor & Freelancer Platforms

Your members value tools and support that improve their financial outcomes, not just job connections.

With Broadbench, your community gets access to:

- Specialist contractor mortgage advice
- Business protection education
- Personal protection reviews

Benefits:

- Increased member engagement
- Added perceived value
- Monetisation opportunities

## Professional Networks

Senior professionals face complex income and risk arrangements that require specialist support.

Broadbench offers bespoke advice with complete regulatory compliance.



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# The Partnership Process

We've designed the partnership process to be simple, compliant, transparent and commercially rewarding.

## Step 1 – Initial Alignment Call

We begin with a short (usually 20–30 minute) introduction conversation where we:

- Understand your business and audience
- Explore how Broadbench can support your clients/members
- Discuss possible collaboration models

No obligations, this call is purely exploratory.

## Step 3 – Launch & Integration

We provide:

- Branded or co-branded partner materials
- Introducer guidelines
- Digital assets for distribution
- Webinar and educational session planning

Your audience can be introduced easily through existing channels, with minimal lift from your team.

## Step 2 – Partnership Structure Set-Up

Once a mutual fit is agreed, we establish:

1. Communication pathway
2. Referral process
3. Tracking & reporting
4. Marketing support plan
5. Remuneration model

This is documented clearly so expectations are transparent.

## Step 4 – Lead Assessment & Advice

Once a lead is submitted:

- Broadbench conducts a comprehensive fact find
- We assess needs and create a regulated advice plan
- Suitability documentation is produced
- Client is supported through implementation

Throughout this process, you remain informed and in alignment with client progress.



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# Marketing Support for Partners

We understand that partners often need help promoting the value we jointly deliver, without adding workload.

## Co-Branded Collateral

- PDF Guides (e.g., “Contractor Mortgage Guide 2026,” “Business Protection Explained”)
- Internal guides to upspeed your team
- Disclaimers and guidance to ensure dual-compliance
- Case Studies
- Blogs

## Social & Email Support Kits

We supply a Quarterly Partnership Pack that includes monthly content:

- Pre-written email sequences
- Social copy
- Graphics and banners
- Campaign calendar

These make it easy to execute campaigns monthly or as required.

## Educational Webinars

We host or co-host live sessions on:

- Mortgage planning for contractors
- Business protection fundamentals
- Personal income protection strategies
- Relevant life and tax-efficient structuring

Webinars can be co-branded or host-branded.

## Web & Digital Support

- Landing pages hosted on your site or ours
- Introductory partner widgets
- Embedded forms with booking platform
- Banners



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# Remuneration & Enhanced Earnings

Our partnership models are designed to be fair, transparent and aligned to activity and value delivered.

## Standard Referral Model

You receive a fee or revenue share for qualifying introductions.

Qualifying means:

- The lead is genuine and has valid contact details
- The client enquiry results in a Welcome Meeting with a Broadbench adviser

We track conversions and provide reporting.

## Enhanced Remuneration

This comes into play when lead volumes exceed 30 leads per calendar month, and the quality of leads is deemed to be good (under 30% dropped out of process and/or rejected.)

The enhanced remuneration is discussed with that partner and agreed on. It's in our interest to reward partners with higher volumes of leads.

## Reporting & Transparency

Partners receive access to our CRM to monitor leads. This ensures you always know how the partnership is performing. You'll receive a remuneration statement on a monthly basis.



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# FAQs

**Q: Do clients remain our clients?**

Yes — client relationships remain with you. Broadbench provides specialist advice that complements your services.

**Q: How quickly can we launch?**

Most partnerships go live within 2–4 weeks of agreement.

**Q: Is this fully compliant?**

Yes. All advice is FCA regulated and documented.

**Q: What support is provided for digital marketing?**

We supply ready-to-use collateral, social content, email sequences and webinar materials.

# Next Steps

Ready to explore how we can work together?

- 1 Book a Partnership Call**  
A short call to discuss your audience and objectives.
- 2 Sign Your Partnership Contract**  
A tailored document that provides transparency, details the scope of the arrangement and confirms the remuneration package.
- 3 Go Live & Grow**



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# Our partners

Our partners come in all shapes and sizes. We work with accountants, financial advisers, well-connected business professionals, LinkedIn group owners, industry experts and more.

All it requires is a desire to help your clients gain access to expert financial advice.

“ Broadbench is a key partner, providing financial services across our four business advice sites. They provide a seamless professional service for business owners, driven by cutting-edge technology. Hearing consistently good feedback from our visitors makes things very easy for me, as a publisher. The Broadbench team is dynamic, proactive, and always keen to try new ideas. Lead tracking is instant and transparent - this is also an essential element to any successful partnership. ”

**James Leckie**  
**Managing Director**

IT Contracting/ Contract Eye/  
Bytestart and Limited Company Help

“ We have been partnered exclusively with Broadbench for many years, and never had a single complaint. ”

They are a very professional, knowledgeable and customer-focused organisation – that understands the importance of putting customer service first. We’ve worked with IFAs for over 20 years. They are the best, by a long way.

**Dave Chaplin**  
**CEO**

Contractor Calculator

“ Clarity Taxation can proudly say that we solely refer our clients to Broadbench for their insurance, mortgage and pension advice. Broadbench has the same level of personal service and turnaround time as Clarity which is a great compliment when providing advice to our clients. ”

The process of referring clients is seamless and prompt. We have received nothing but positive feedback from our clients.

**Craig Szeto**  
**Managing Director**  
Clarity Taxation



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# Find out more

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