

Corporate Case Study 1

Employee Benefits

Company X specialises in public relations. It has a payroll of 65 people, with a median salary of £45,000. They had in place a standard package of employee benefits from other advisers. They were aware that the other advisers were not Independent Financial Advisers and that they advised only a narrow range of providers. What they weren't aware of was the cost of the advice to the employee.

We conducted a review of their current scheme which was with Friends Provident. So as to not disrupt company X too much we decided to stay with Friends Provident but negotiate better terms for the employees. The difference means that the employees will have an enhanced pension when they come to retire.

Importantly, with our help, the company directors communicated with their employees about the improvements to their scheme via an email and we held a seminar for interested employees to help demystify what often is seen as a complex topic. Throughout it all we worked with the directors to ensure that the message to the staff was one of company care and one of looking after their employees' best interests.

If you would like to discuss any of the above in more detail please do not hesitate to contact us.

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