


Joining Peritus

As a self-employed adviser
or appointed representative.



A person wearing a blue suit jacket and a black watch is holding a brown leather briefcase with a gold-colored clasp. The background is a light, textured surface.

Here at Peritus we can offer you a fantastic support package enabling you to spend more time with your clients as a self-employed adviser or appointed representative (AR).

Both options give you time to focus on giving high quality advice and generating income whilst reducing your compliance burden. You will be provided with FCA application completion assistance, comprehensive admin support; access to the necessary sourcing systems (Tri-Gold & IRESS Exchange); practice management system (XPlan Mortgages); compliance and marketing support.

You'll be covered under the Peritus PI insurance with liability extending to any excess and costs incurred should a complaint need to be upheld by Peritus.

Joining Peritus gives you full flexibility to earn what you want to earn and work when you wish. It reduces your compliance burden with a streamlined compliance process and a common sense approach to business.



Tri-Gold | IRESS Exchange | XPlan Mortgages

Joining Peritus means you...

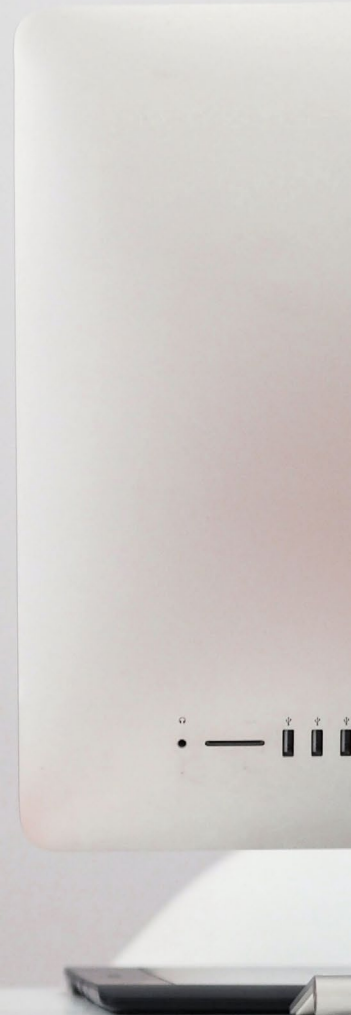
- Have the option of full administrative support including Fact Find input, client file maintenance, client liaison and suitability letter writing.
- Spend more time with your clients.
- Earn more money and have a better work/life balance.
- Operate without sales targets and league tables.
- Could have no fixed overheads and all costs covered by Peritus, whilst having access to efficient administrative and compliance support.
- Add value to your business whilst planning your exit strategy if desired.
- Have access to design and marketing support.
- Have no clawback allowance taken for Protection business
- Won't have a minimum retention
- Have access to our expert commercial finance team
- Can refer to our Equity Release Experts
- Can access to Peritus Wealth Management team for advice on Investments and Pensions.

“Joining Peritus is the best career choice I have made”



“Joining Peritus late 2017 was the best career choice I have made and it has been an extremely satisfying journey ever since. The Peritus Group is a great company to be a part of with a very close knit team. They offer the flexibility of working for myself whilst also benefitting from the daily support of the compliance and admin support, which allows me to concentrate on generating more quality business. Having spoken to many different brokerages, I genuinely don't believe that any other firm would allow you to run your business through their firm in the way that Peritus does”.

Vickram Negi, Mortgage Adviser



“It has given me the opportunity to spend more time with my clients knowing that my admin and compliance obligations are being looked after”



“Having worked under Peritus Private Finance’s umbrella for over 3 years now , it has given me peace of mind and the opportunity to spend more time with my clients knowing that my admin and compliance obligations are being looked after by Peritus”.

John Stewart, Mortgage Adviser

Financial Proposal

As an adviser or AR of Peritus you will receive 75% of all gross commission and fees where you generate the business from your existing clients or acquire new clients that you introduce to Peritus.

Where the clients originate from Peritus and are passed to you and you transact business you will receive 50% of the gross commission and fees. (After introducer split.)

Referrals for Commercial/Corporate finance, Wealth Management and Mortgage Business can be agreed individually based on the case attributes so it is beneficial to both parties.

Bespoke packages available for multi-adviser appointed representatives and higher turnover advisers.

75%
from your existing clients

50%
clients originate from Peritus



fee for referrals negotiable

Scope of services

Peritus Private Finance

- Mortgages
- BTL
- Ltd Co BTL
- Regulated Bridging
- Equity Release
- Buildings and Contents
- Protection

Peritus Corporate Finance

- Bridging
- Development Finance
- Mezzanine Funding
- JV Finance
- Equity Funding
- Building Warranties
- Invoice Discounting
- Factoring
- Asset Finance
- Business Loans
- Wealth Management
- Pensions

Call 020 3745 5893 to speak to Matthew to arrange an informal chat.
Check out peritus-group.co.uk for more information on the company.



We look forward to meeting you.

This offer is subject to you meeting our regulatory due diligence checks which include, fit and proper questions, credit check, asset and liabilities request and a DBS Check (CRB). Peritus reserves the right to terminate the agreement should these checks fail to meet our required standards during the initial joining stage or at a future annual check of these items.

For more details on the proposal offered by Peritus Private Finance

Call 020 3745 5893

matthew@peritus-group.co.uk www.peritusprivatefinance.co.uk



PERITUS
PRIVATE FINANCE

Registered Address: Peritus Private Finance Ltd, 30 Broadwick Street, Soho, London W1F 8LX
Registered in: England and Wales Reg No. 03490834
Peritus Private Finance Ltd is authorised and regulated by the Financial Conduct Authority.