Panacea Adviser

ENGAGE WITH THE ORGANISATIONS YOU SPECIFICALLY WANT TO WORK WITH

TARGETING OPTIONS

Independently-verified community data to enable smarter targeting

This document details the various ways in which we can target lead generation emails.

You can either use this document as a guide and email your requirements or you can complete it where applicable.

The following options are free-form:

- Include or exclude specific FRNs – please provide as a separate .csv file
- Readership interests – List any specific readership interests below
- New Sales activity – List any specific AUM or activity level below (min/max)
- Network – List any Network you wish to include or exclude below

TARGETING OPTIONS

GEOGRAPHIC REGION	✓
All	
East Midlands	
East of England	
London	
North East	
North West	
Northern Ireland	
Scotland	
South East	
South West	
Wales	
West Midlands	
Yorkshire and The Humber	

SMF FUNCTION	✓
All	
SMF1 (AR) Chief Executive function	
SMF1 Chief Executive	
SMF2 Chief Finance	
SMF3 (AR) Executive Director function	
SMF3 Executive Director	
SMF4 (AR) Partner function	
SMF4 Chief Risk	
SMF16 Compliance Oversight	
SMF17 Money Laundering Reporting Officer (MLRO)	
SMF27 Partner	
SMF29 Limited scope function (limited scope SMCR firms only)	

CII QUALIFICATIONS		✓
GR1	Group risk	
J02	Trusts	
J05	Pension income options	
J07	Supervision in a regulated environment	
J09	Paraplanning	
J10	Discretionary investment management	
R01	Financial services, regulation & ethics	
R02	Investment principles and risk	
R03	Personal taxation	
R04	Pensions and retirement planning	
R05	Financial protection	
R06	Financial planning practice	
R07	Advanced mortgage advice	

TARGETING OPTIONS – PREFERRED SEGMENTS

FOR WRAPPERS & INVESTMENTS	✓
All	
AR of DFM/Stockbroker	
AR of Holistic Financial Planner	
AR of Wealth Manager	
AR of Wealth/Investment Adviser	
DFM/Stockbroker	
Holistic Financial Planner	
Wealth Manager	
Wealth/Investment Adviser	

FOR PROTECTION & MORTGAGE	✓
All	
AR of Holistic Financial Planner	
AR of Mortgage Event Adviser	
AR of Wealth Manager	
AR of Wealth/Investment Adviser	
General Insurance Broker	
Holistic Financial Planner	
Mortgage Event Adviser	
Wealth Manager	
Wealth/Investment Adviser	

Segmentation of firms are done by Autus using an algorithm of FCA Firm permissions. There are over 80 different permissions on the FCA Register/ Directory.

Holistic Financial Planners have permissions to arrange Investments, Pensions (inc types of Pension Transfer), Protection & Mortgages.

Wealth & Investment Advisers have permissions to arrange Protection, Investment and Pensions (inc types of Pension Transfer)

Wealth Managers have permissions to to arrange and 'manage' Investments and Pensions (inc types of Pension Transfer) and arrange Protection. They cannot hold client cash.

DFMs manage Discretionary Investment Portfolios on behalf of Direct clients and Advice firms. They also offer MPS irrespective whether it's an Investment or a Pensions Wrapper.

TARGETING OPTIONS

OTHER SEGMENTS/ ADVISER TYPE	✓
AR of General Insurance Broker	
AR of Mortgage (only) Broker	
Banking - Investment (only)	
Banking - Retail (only)	
Banking - Retail & Investment	
Collective Investment Provider	
Debt Collecting/Administration	
EEA Authorised	
Equity Release/Home Reversion Specialist	
Friendly Society	
General Insurance Broker	

OTHER SEGMENTS/ ADVISER TYPE	✓
General Insurance Provider/Reinsurer	
Introducer AR	
Investment Support Services	
Investment/Capital Management	
Life/Pension/Annuity Provider	
Mortgage (only) Broker	
Non Advisory Investment Broker Professional / Counterparty	
Non Advisory Investment Broker Retail	
Other	

TYPE	✓
Paraplanners	

FIRM SIZE BY ADVISERS	✓
All	
Micro (1)	
Small (2 - 3)	
Medium (4 - 10)	
Large (11-25)	
Very Large (26+)	

MPS USERS	✓
MPS only	
All users	

TARGETING OPTIONS – WRAPPER-SPECIFIC

PENSION TRANSFERS	✓
All firms	
No restrictions	
Restricted transfers	

PRODUCT WRAPPER	✓
All	
Cash ISA	
Executive Pension Plan	
Investment Account	
JISA	
LISA	
None	
Offshore Bond	
Onshore Bond	
Other	
Personal Pension	
SIPP	
SSAS	
Stocks & Shares ISA	
Unknown	

TARGETING OPTIONS – INVESTMENTS-SPECIFIC

MPS USERS	✓
MPS only	
All users	

PENSION TRANSFERS	✓
All firms	
No restrictions	
Restricted transfers	

AUM	
From:	
To:	

IA SECTOR	✓
All	
IA Asia Pacific Excluding Japan	
IA Asia Pacific Including Japan	
IA China/Greater China	
IA Commodity/Natural Resources	
IA EUR Corporate Bond	
IA EUR Government Bond	
IA EUR High Yield Bond	
IA EUR Mixed Bond	
IA Europe Excluding UK	
IA Europe Including UK	
IA European Smaller Companies	
IA Financials and Financial Innovation	
IA Flexible Investment	

IA SECTOR	✓
IA Global	
IA Global Bonds	
IA Global Corporate Bond	
IA Global EM Bonds - Blended	
IA Global EM Bonds - Hard Currency	
IA Global EM Bonds - Local Currency	
IA Global Emerging Markets	
IA Global Equity Income	
IA Global Government Bond	
IA Global High Yield Bond	
IA Global Inflation Linked Bond	
IA Global Mixed Bond	
IA Healthcare	

TARGETING OPTIONS – INVESTMENTS-SPECIFIC

IA SECTOR	✓
IA India/Indian Subcontinent	
IA Infrastructure	
IA Japan	
IA Japanese Smaller Companies	
IA Latin America	
IA Mixed Investment 0-35% Shares	
IA Mixed Investment 20-60% Shares	
IA Mixed Investment 40-85% Shares	
IA North America	
IA North American Smaller Companies	
IA Property Other	
IA Short Term Money Market	
IA Specialist	

IA SECTOR	✓
IA Specialist Bond	
IA Standard Money Market	
IA Sterling Corporate Bond	
IA Sterling High Yield	
IA Sterling Strategic Bond	
IA Targeted Absolute Return	
IA Technology and Technology Innovations	
IA UK All Companies	
IA UK Direct Property	
IA UK Equity & Bond Income	
IA UK Equity Income	
IA UK Gilts	
IA UK Index Linked Gilts	
IA UK Smaller Companies	
IA Unclassified	
IA USD Corporate Bond	

IA SECTOR	✓
IA USD Government Bond	
IA USD High Yield Bond	
IA USD Mixed Bond	
IA Volatility Managed	
Not yet assigned	
ETFs/Shares/Structured	

TARGETING OPTIONS – PROTECTION-SPECIFIC

PROTECTION PRODUCT	✓
All	
Business Protection	
Critical Illness	
Decreasing Term CIC	
Income Protection	
Mortgage Term	
Relevant Life	
Term	
Term CIC	
Whole Life	

IMPORTANT INFORMATION

For more information visit:

www.panaceaadviser.com

www.panaceapartners.com

Panacea Adviser (Panacea) is a trading name of **GRANTMELL LIMITED** incorporated and registered in the UK with company number 05688007 whose registered office is at The Spark, Drayman's Way, Newcastle Helix, Newcastle upon Tyne, NE4 5DE.