Turn opportunity into lasting client relationships

Fortis Connect helps advice firms build a stronger client pipeline, develop adviser capability and take the next step in their business.



Built by advisers, for advisers.

THREE WAYS TO SUPPORT YOUR NEXT STAGE

01

Appointments & conversions

04-05 →

02

Applied consultancy

06 →

03

Education & academy

07 →

Practical experience Shared ambition

Built by advisers, for advisers, Fortis Connect connects commercial ambition with practical support for the realities of running an advice firm.

A STRONGER ROUTE FROM PROSPECT TO CLIENT

The right introduction is only the start. We bring matched opportunities, practical development and business support together around your goals and capacity.

1. **Clear proposition**
2. **Confident conversations**
3. **Reliable follow-up**

THE ADVICE MARKET IN CONTEXT

69%

of retail advice clients had a retirement-related primary objective, according to firms surveyed by the FCA.

36%

of medium-sized firms planned or were considering regulated-revenue growth above 25% over the next two years.

MARKET CONTEXT, NOT FORTIS OUTCOMES

Source: FCA, Understanding the advice market: financial advice firms survey 2025 (23 April 2026), sections 6.1 and 3.5. 69% combines retirement saving, consolidation and pension access. 36% combines planned/considered growth for firms with 6-49 advisers.

The right support for your next stage

Choose the route that meets your current priority. Each starts with a conversation about your goals, capacity and the support you need.

01

Appointments & conversions

A STRONGER CLIENT PIPELINE

Develop your prospect-to-client process through Conversion Camp, or access matched appointments once readiness is confirmed.

Conversion Camp 04 Appointments 05

02

Applied consultancy

A CLEARER BUSINESS PLAN

Turn growth, efficiency and exit-readiness priorities into a focused plan for your business.

Growth, efficiency and exit readiness 06

03

Education & academy

STRONGER TEAM CAPABILITY

Build capability through focused workshops, team learning and specialist preparation.

Adviser and leadership development 07

Conversion Camp

A structured programme to build confidence, apply the learning and strengthen your prospect-to-client process.

12	3	6
weeks	core workshops	coaching clinics

A CLEAR PATH THROUGH TWELVE WEEKS

1 — 2 — 3

WEEKS 1-4

Foundation

Clarify your client profile and value proposition. Practise the first meeting. Confirm readiness before introductions.

WEEKS 5-8

Application

Apply learning in staged appointments. Use coaching feedback to refine discovery, follow-up and next steps.

WEEKS 9-12

Consistency

Refine later-stage conversations. Review progress and agree your next development plan.

YOUR PRACTICAL TOOLKIT

- **Meeting framework**
- **Follow-up plan**
- **Actionable coaching feedback**
- **Personal development plan**

Onboarding included. Appointment allocation and scope agreed before enrolment.

Appointments only

The right introduction. A prepared adviser.

For firms with a clear client proposition, an established process and capacity to welcome new clients.

1. **Agree fit**
   Ideal-client needs and adviser capacity.
2. **Confirm readiness**
   Mandatory onboarding before introductions.
3. **Qualify & coordinate**
   Prospect qualification, booking and reminders.
4. **Brief & meet**
   Pre-meeting information and preparation.
5. **Review & improve**
   Follow-up and service-quality reporting.

READY TO MAKE
THE MOST OF IT

A clear match

Your proposition, the prospect's needs and the reason for seeking advice.

A consistent standard

Preparation, timely follow-up and transparent reporting.

Specialist introductions require additional readiness.

Onboarding and ongoing coaching are scoped separately.

A stronger business by design

A focused review gives you clarity on what matters, what gets in the way and what to tackle first.



YOUR OUTPUT

Focused diagnostic

90 DAY ACTION PLAN

THREE PRIORITIES FOR YOUR BUSINESS

01	**Growth**	Sharpen your proposition and acquisition priorities.
02	**Efficiency**	Improve workflows, responsibilities, adviser performance management and MI.
03	**Exit readiness**	Reduce owner dependence and prepare for succession or a future transaction.

Space to step back. A plan to move forward.

We help translate business priorities into clear decisions, practical ownership and an actionable plan.

Implementation is scoped separately, alongside your legal, tax and transaction advisers where needed.

Capability that stays with your team

Practical learning for advisers, practice leaders and teams, shaped around the development need you want to address.



Shared learning
Stronger practice

Choose a focused workshop, a firm cohort or a structured programme that complements your existing academy.

01

Adviser development

Discovery, explaining value, client conversations and follow-up.

02

Practice leadership

Commercial planning, team capacity and growth readiness.

03

Specialist development

Preparation for complex conversations and introducer relationships.

Standalone learning excludes appointments unless agreed. Participation does not confer regulatory permission or accreditation.

Let’s talk about your next stage

15 MINUTES

Start with a conversation about where you are today, what you want to improve and how progress will be reviewed.

More opportunities

Discuss matched appointments and readiness.

A stronger prospect journey

Explore the 12-week Conversion Camp.

A clearer plan or stronger team

Scope a consultancy review or Academy learning.

YOUR NEXT CONVERSATION STARTS HERE

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