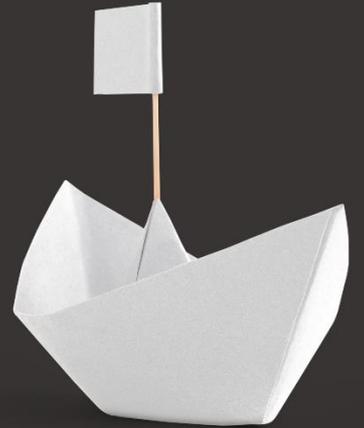


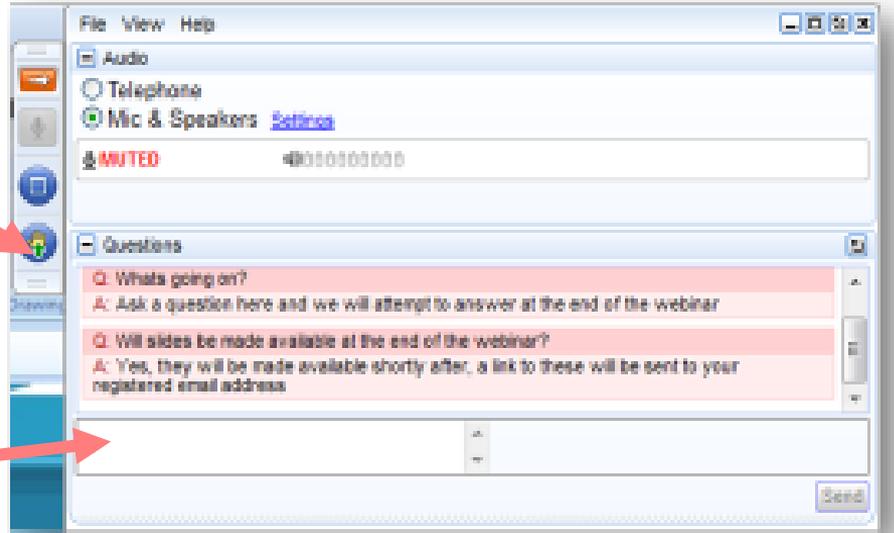
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**Lead generation and
business development in
long term care**



WELCOME

To raise your hand in the webinar, click here



To ask a question, please type here. We will respond during the webinar or shortly afterwards

LEARNING OUTCOMES

- Identify potential clients within your own client bank and consider how to attract new clients.
- Evaluate which professional connections to approach based on potential and specialism.
- Understand the value of good website content and evaluate the use of social media.
- Outline the benefits of seminars and the use of local press and advertising to raise awareness of your services.
- Demonstrate how to make best use of professional accreditation and understand how it can enhance new opportunities.

BUSINESS DEVELOPMENT AND LEAD GENERATION

- Advice opportunities with existing clients.



YOUR OWN CLIENTS

What is the age range of your client bank?

Many advisers have clients around the retirement age

Ages 50 – 70 may be acting as attorneys for parent(s)

Everyone has (or had) parents

Do you ask if they have done their power of attorney?

Do you ask if they are acting as an attorney?

POA – maybe indicator of care need?

Is it raised at reviews with all clients?

Clients acting as attorneys need advice

SCENARIO FOR YOUR CLIENT(S)?

Parent(s) need care

Family do not expect or understand longevity

Good quality care being received – activities etc

Mum/dad condition improves – new lease of life

Then worries about longevity arise

How long will they live? Conflict arises in their minds?

Erosion of money in the bank – ramifications if it runs out?

How long will it last? Are they expecting inheritance?

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MARKETING TO EXISTING CLIENTS

It costs more to get new clients versus dealing with existing

It costs nothing to ask your clients to refer and recommend you to others

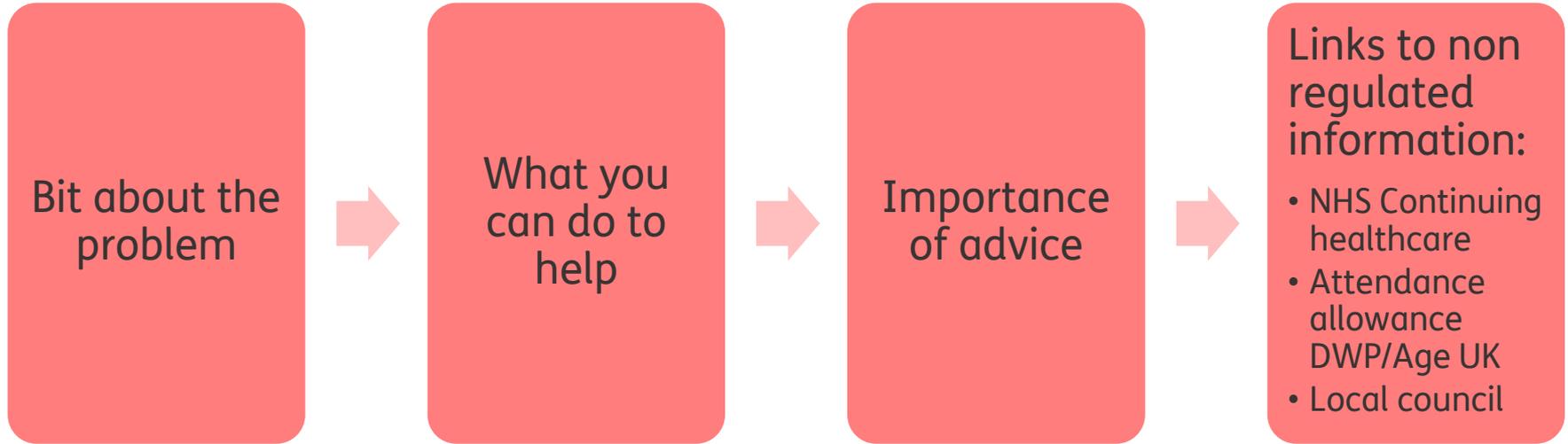
Let all clients know about your later life/care specialism

Get them to refer others – friends/family

Let **all** staff know that you may be able to help – warm referrals

Client seminars (more later)

GOOD WEBSITE CONTENT



POLL QUESTION

Do you have content on your website specifically about long term care?

1. Yes
2. No
3. No, currently considering and would like suggestions re content

SOCIAL MEDIA



LinkedIn



INSTAGRAM



AND MANY OTHERS

For financial intermediary use only, not to be used with customers.

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POLL QUESTION

Do you use social media for business purposes?

1. Yes
2. No
3. Not at the moment, but intend to start

BUSINESS DEVELOPMENT AND LEAD GENERATION

- Advice opportunities with existing clients.
- Develop ongoing professional connections.



PROFESSIONAL CONNECTIONS – SOLICITORS AND ACCOUNTANTS

Majority prefer good local profile and reputation

Strong emphasis on professional qualifications:

- Certified or chartered and/or accreditation
- Experience important but secondary

Plenty of scope:

- Approximately 140,000* solicitors and around 150,000** ICAEW chartered accountants
- Estimated 22,000 R/I's – whole of market

SIFA:

- Advisers can add value in certain areas - older client

SOLLA / Symponia membership?

*Source Solicitors Regulation Authority

**ICAEW (global figure)

APPROACH WITH PROFESSIONAL CONNECTIONS

Target:

- Clarity of who to approach – size, location, specialism

Approach:

- Networking, direct 1-to-1 meetings
- Seminars/workshops on relevant topics – e.g. later life and long term care
- Webinars or reciprocal speaking opportunities

Nurture:

- Takes time to nurture relationship
- Phases – know, like and trust phases – build credibility

Follow up:

- Robust process for keeping in touch
- Newsletter, Twitter/LinkedIn/Facebook/YouTube.
- Find reasons to keep in touch, but do not overwhelm

SOLICITORS PRESENT A VALUABLE LEAD OPPORTUNITY

Wills/Acting as or arranging POA?

- Drawing up wills for clients
- LPA - tends to require solicitor input
- Conveyancing – family selling property to fund care?

One to one meetings/discussions/presentations

Seminars/presentations:

- Partners/fee earners within one practice
- Larger groups of various local practices
- Importance of financial advice

Cover main aspects of care funding

- NHS funded Continuing Care/Funded Nursing Care
- Care Act and local authority assessments
- Power of attorney duties
- All options for care funding
- Care annuity and options
- Lack of awareness/understanding!

LOCAL SOLICITORS



The Law Society is the independent professional body for solicitors

Search facility

Database of all legal professionals

Search by legal issues

Postcode search

SOLICITORS REGULATION AUTHORITY



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Finding a solicitor

Because we are [independent](#) from the legal profession, we cannot tell you which [solicitor](#) to use. However, we can give you advice about finding a solicitor who is best suited to your individual needs. There are quite a few factors you will need to consider when choosing a solicitor, and it is wise to shop around — begin by finding a few that meet your basic requirements, and then contact them to find out more about how they can help you. It is important that you find one that you feel comfortable using, to get the best out of your working relationship.

This page can help you with

- [finding a solicitor](#)
- [narrowing down your search](#)

<https://sra.org.uk/consumers/using-solicitor/find-solicitor.page>

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Search the database for
Solicitors in your area

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SOLICITORS FOR THE ELDERLY -SFE



SFE (Solicitors for the Elderly) is an independent, national organisation of lawyers, such as solicitors, barristers, and chartered legal executives who provide specialist legal advice for older and vulnerable people, their families and carers.

➔ Looking for Legal Advice?

If you are a member of the public and looking for legal advice, click here.

➔ Industry Information

For professionals working in the area of the elderly. For all press and media.

➔ SFE Members Area

For all membership enquiries and portal access please click here.



Search facility

Search by legal expertise

Postcode search

<http://www.sfe.legal/>

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BUSINESS DEVELOPMENT AND LEAD GENERATION

- Advice opportunities with existing clients.
- Develop ongoing professional connections.
- Professional bodies/accreditations.



HELP WITH PROFESSIONAL CONNECTIONS

Join SIFA



<https://www.sifa.co.uk/>

“The SIFA service is built upon the foundations of robust, reliable and high quality compliance support.”

Join STEP



<https://www.step.org/>

“Our primary purpose is to improve public understanding of the issues families face in relation to inheritance succession planning and promote education and high professional standards among our members.”

Join SOLLA



<https://societyoflaterlifeadvisers.co.uk/>

“SOLLA helps people and their families in finding trusted accredited financial advisers who understand financial needs in later life.”

POLL QUESTION

Are you a member of any of the following (please click all that apply):

1. SOLLA
2. STEP
3. SIFA
4. None of the above

BUSINESS DEVELOPMENT AND LEAD GENERATION

- Advice opportunities with existing clients.
- Develop ongoing professional connections.
- Professional bodies/accreditations.
- Estate agents and other entities.



CONTACT ESTATE AGENTS TO TAP THEIR RESOURCES

Most families sell property to fund care
• Appoint agent

Will be localised

Will be aware of reason for sale

Run down?

Value known

Cold call may be difficult

Existing contacts?

Will want something back?

CARE HOMES PRESENT ANOTHER IN-ROAD TO CONVERT FURTHER LEADS

More difficult than you might think!

- Cold calls will be avoided
- Their priority is caring not finance
- Make contacts through local business groups
- Can take time to build relationship and trust
- Specialists – 1 year + before business flow

Keep localised – avoid big groups

- Individual homes
- Small local groups, say 2 to 10 homes
- Link with solicitor – joint clinics and information days

Care home staff move around – good and bad!

- Keep in touch
- Replaced with someone not so helpful
- Make contact with new care home?

OTHER AREAS WHERE YOU CAN TAKE ACTION TO DEVELOP LEADS



Will writers

**Local
Chamber of
Commerce?**

Business clubs



Other clubs

WI



Presentations



Press (local)

THE THIRD AGE TRUST



THE UNIVERSITY OF THE THIRD AGE

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BUSINESS DEVELOPMENT AND LEAD GENERATION

- Advice opportunities with existing clients.
- Develop ongoing professional connections.
- Professional bodies/accreditations.
- Estate agents and other entities.
- Seminars relating to later life/care.



CLIENT SEMINARS

Who should attend?

- Ages 70 and over
- Sons/daughters of those needing care
- Grandsons/daughters
- Nieces/nephews
- Make POA a client in their own right

At 55 people more aware of future and/or their parents' circumstances

- Downsizing
- Releasing capital for leisure or pension income?
- Legal aspects – putting wills/POA's in place
- Care funding legislation
- Forward planning for care?
- Sever tenancy?

POLL QUESTION

Do you conduct client seminars?

1. Yes, regularly
2. Yes, at least once a year
3. No, not at all

BUSINESS DEVELOPMENT AND LEAD GENERATION

- Advice opportunities with existing clients.
- Develop ongoing professional connections.
- Professional bodies/accreditations.
- Estate agents and other entities.
- Seminars relating to later life/care.
- Local advertising.



LOCAL NEWSPAPER



WHAT CAN JUST DO TO HELP YOU?

Knowledgeable dedicated telephone team

Can help you through the processes

Training on all aspects of LTC advice

Qualification training for new entrants

Business development for qualified advisers

Help with SOLLA accreditation

Technical and business development material at:

www.justadviser.com

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LET'S START A NEW CONVERSATION ABOUT RETIREMENT

Just is the new name for Partnership and Just Retirement

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ABOUT JUST

We're rethinking retirement to help people manage the complexities and challenges of later life.

Find out more about [Just](#) and our [Adviser Forums](#).

[Learn more >](#)

OUR PRODUCTS

From providing peace of mind with a guaranteed income that can be used either on its own or as part of a blended solution to releasing equity, we can help with your client's at-retirement solution.

[Learn more >](#)

LITERATURE

Whether it's background reading, customer facing material or forms that you can use directly with your client to make sure they don't miss any key information, here you'll find the full suite of our product literature.

If you would like direct access to the [Retirement Health Form](#), simply [click here](#).

[Learn more >](#)

HOW TO CONTACT OUR CARE EXPERTS



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IMPORTANT INFORMATION



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It is our intention that the information contained within this presentation is accurate. We have taken all reasonable steps to ensure that it is up-to-date and, where relevant, reflects the current views of our experts. However, we do not accept any liability for errors or omissions in the information supplied and if you require clarification on anything, our recommendation is that you contact us at the address below for verification, or call 0345 302 2287.

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Regulatory information:

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