

## – IFA Fact Pack – A Profile of IFAs in the UK

This profile of IFAs in the UK has been prepared in appreciation of your participation in the IFA Census.

Your opinions really do matter to us, as without your valued support, IFAs opinions on a wide range of important issues would never reach key decision makers within today's financial market.

This data has been gathered over the period of January 2006 – December 2006 on NMG's IFA Census, and is accurate as of the year end 2006.

The report contains the following:

- 1: Gender
- 2: Years in Financial Services
- 3: Age
- 4: Professional Qualifications
- 5: Business Locations
- 6: Registered Individuals
- 7: Regulated Status
- 8: Limited Range Basis
- 9: Payment Options Offered
- 10: Role in Firm
- 11: Specialised Area
- 12: Sectors Written
  - Savings and Investments
  - Pensions
  - Protection
  - Mortgages (including Equity Release)

We look forward to your continued support and participation in the **IFA Census**.

Kind Regards,

IFA Census Team  
**NMG Research**  
[info@ifacensus.com](mailto:info@ifacensus.com)

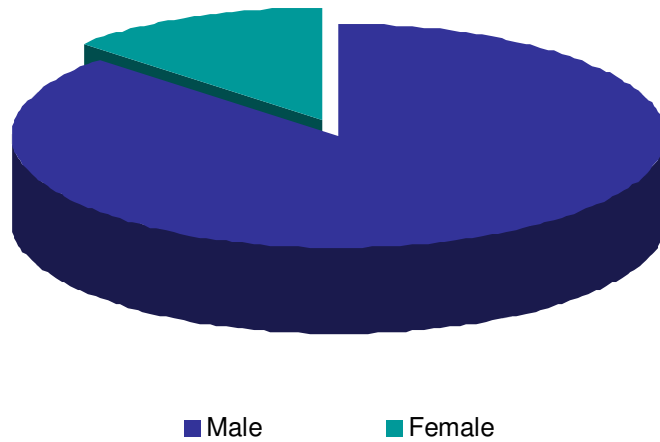
The logo for the IFA Census, featuring the word 'ifa' in a smaller font above the word 'census' in a larger font, both in white, set against a dark blue circular background.

The  
Definitive Source  
of IFA Opinion



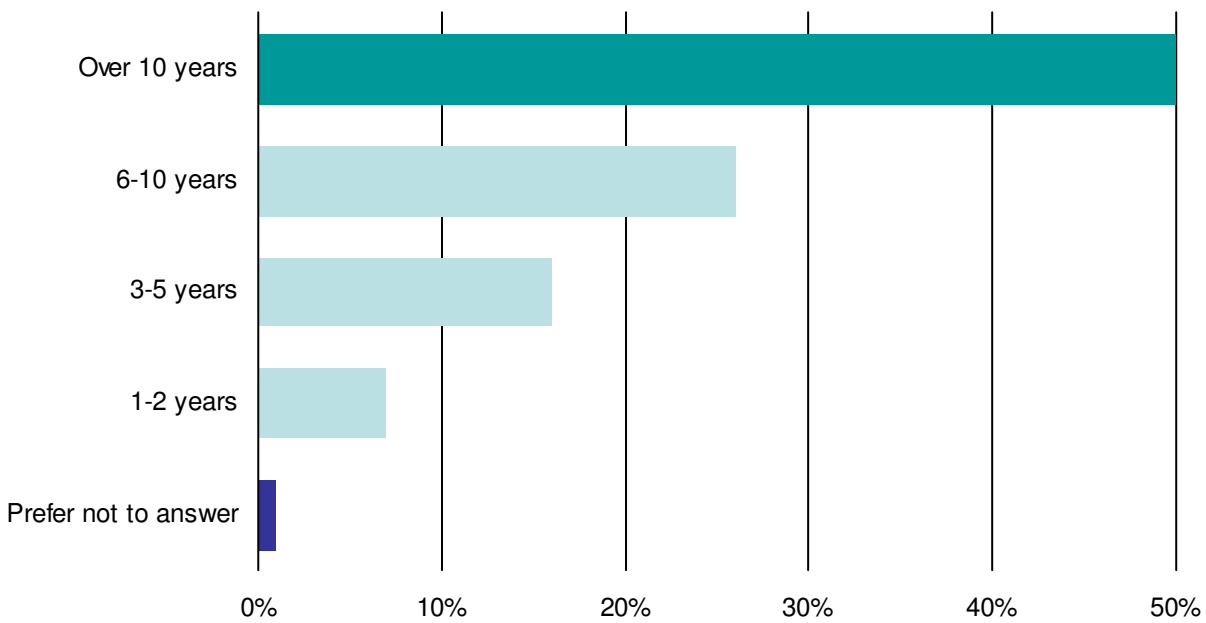
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# 1. Gender



Base: All respondents January 2006 – December 2006 (1248)  
Q: What is your gender?

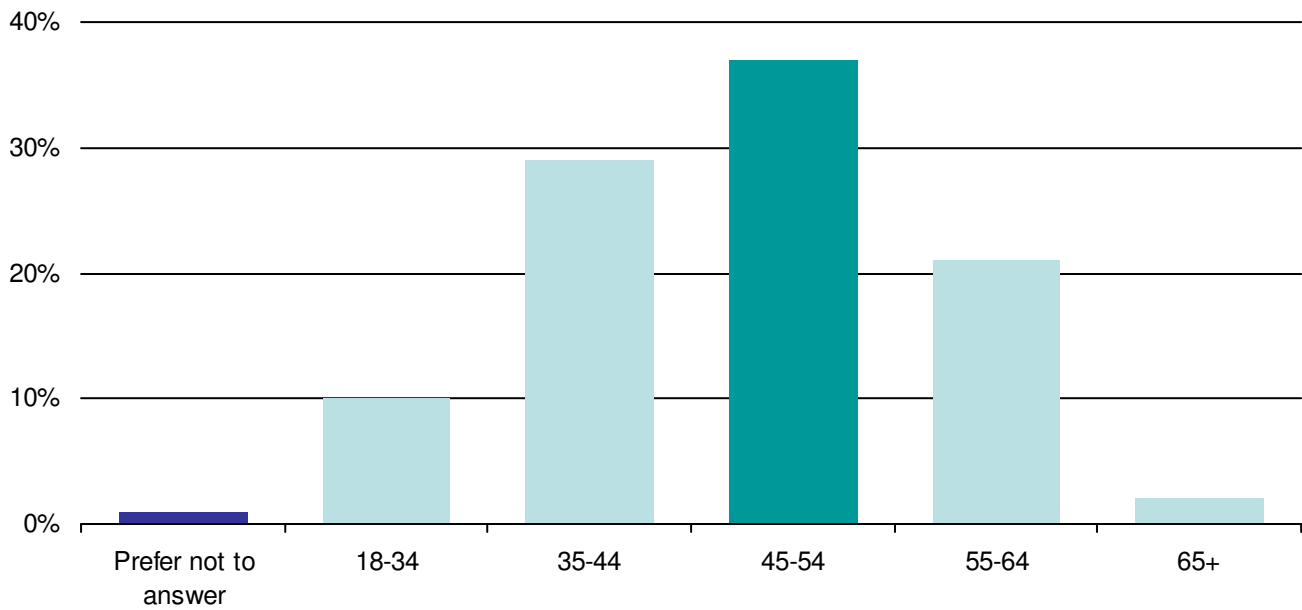
# 2. Years in Financial Services



Base: All respondents January 2006 – December 2006 (1128)  
Q: How long have you been an IFA?

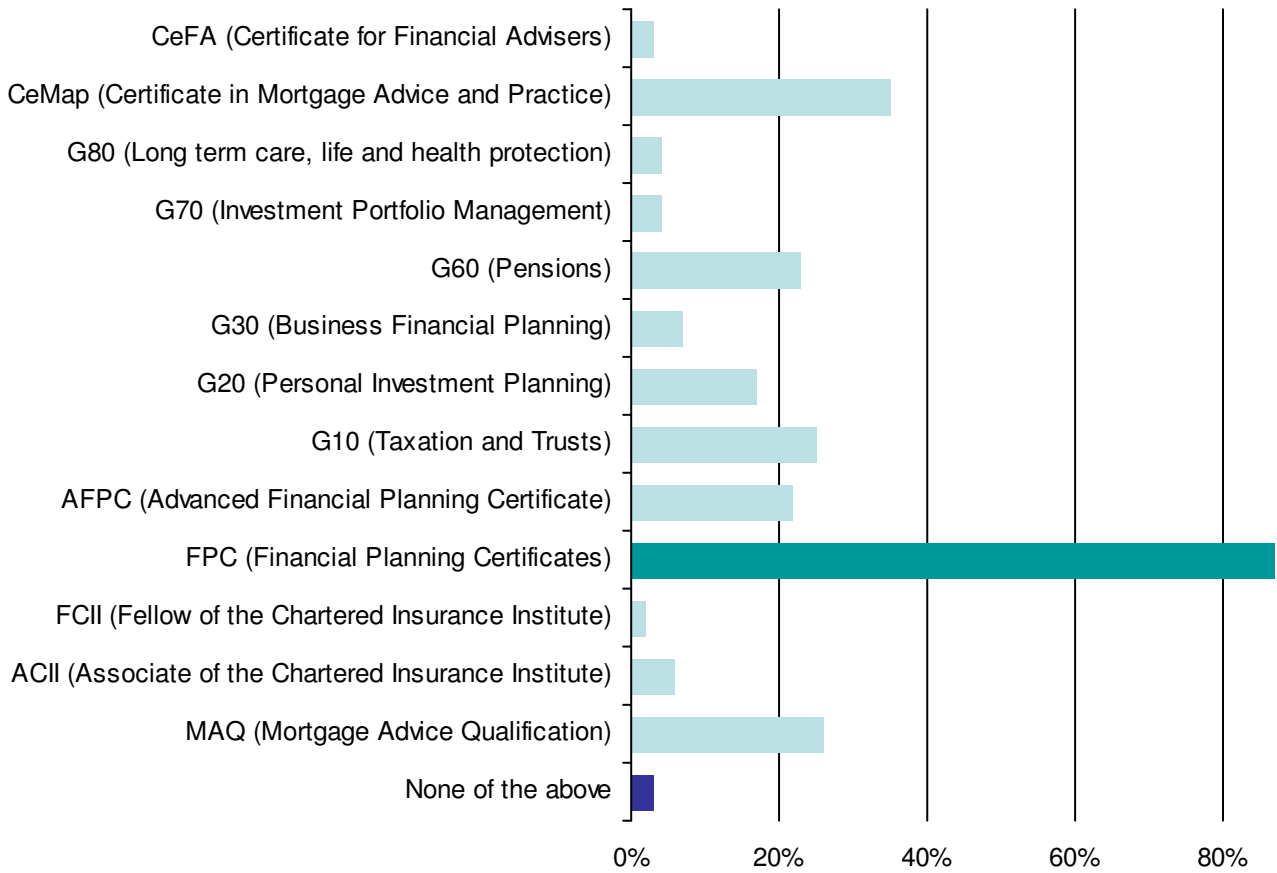
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### 3. Age



Base: All respondents January 2006 – December 2006 (1248)  
Q: Which age band do you fall into?

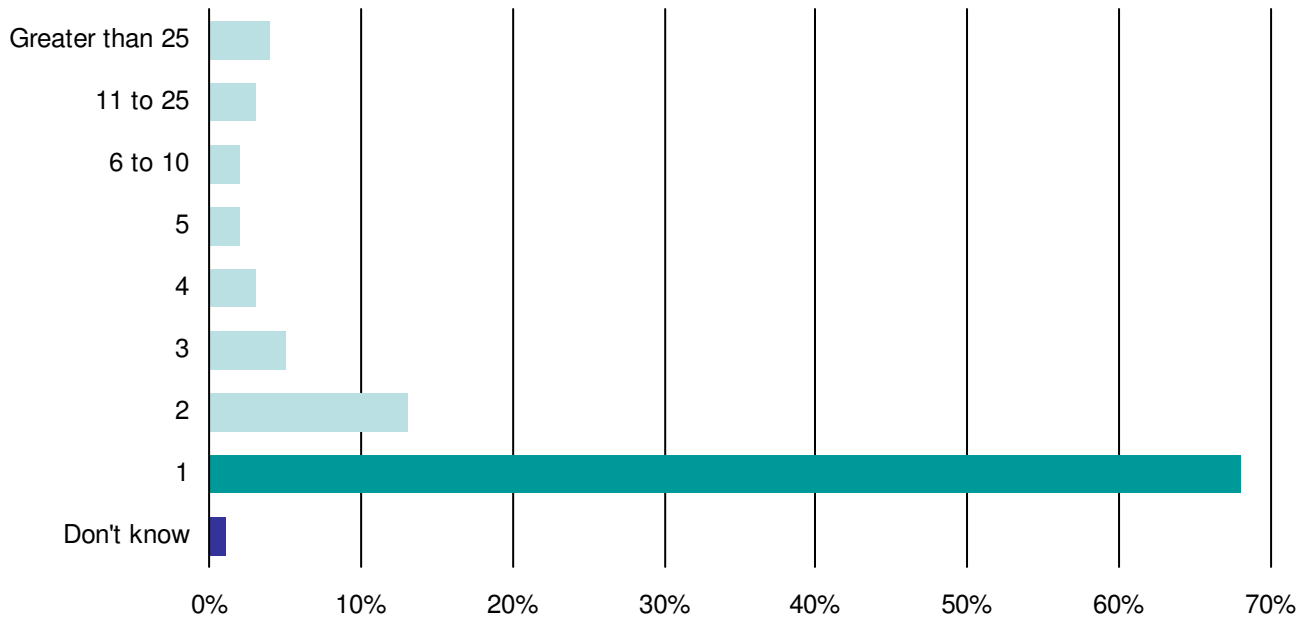
## 4. Professional Qualifications



Base: All respondents January 2006 – December 2006 (1247)

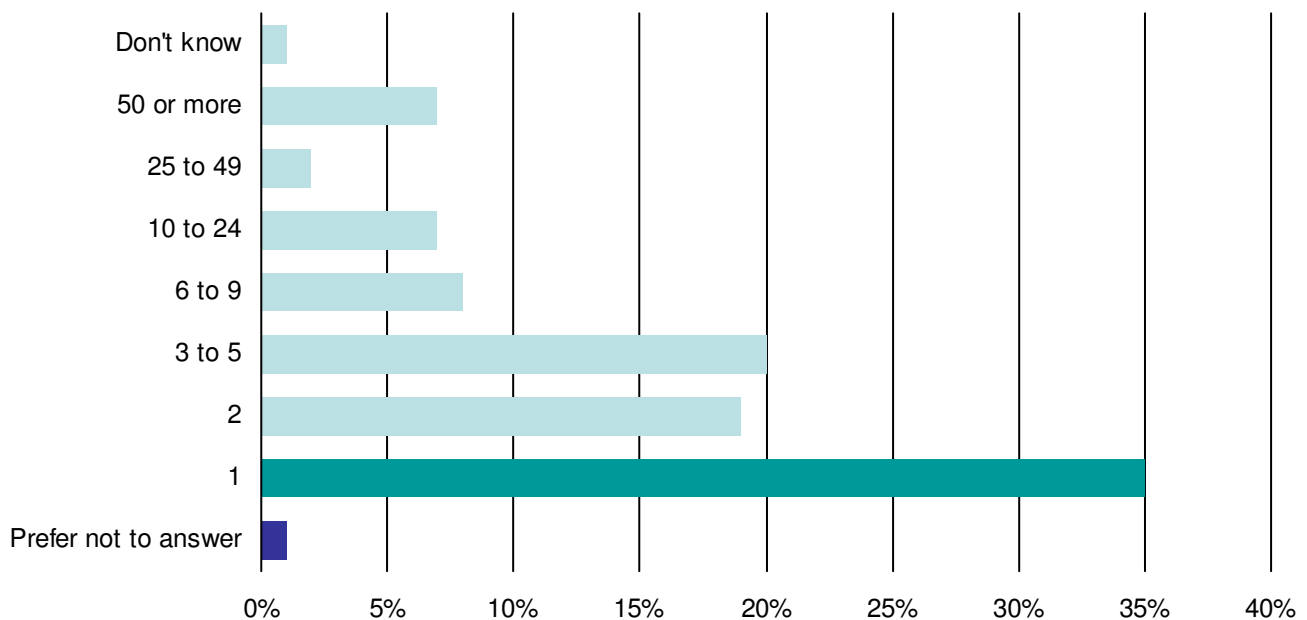
Q: Which of the following professional qualifications do you personally hold?

## 5. Business Locations



Base: All respondents January 2006 – December 2006 (1246)  
 Q: How many physical locations does your business operate out of?

## 6. Registered Individuals



Base: All respondents January 2006 – December 2006 (1248)  
 Q: How many Registered Individuals work for your business in total across all sites?

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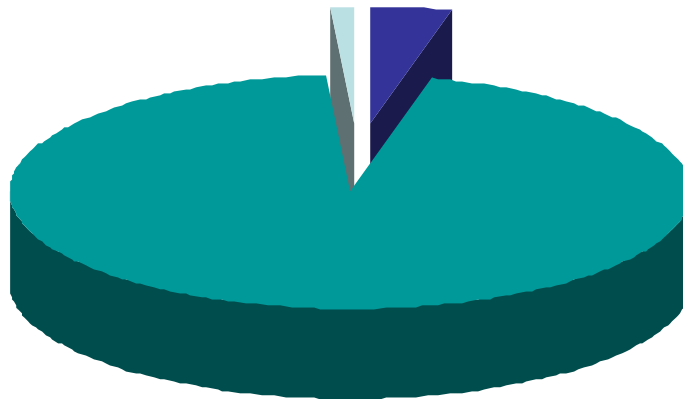
## 7. Regulated Status



- Regulated via an IFA Network or National IFA Partnership
- Directly regulated
- Not applicable to me

Base: All respondents January 2006 – December 2006 (1248)  
Q: What is your regulated status?

## 8. Limited Range Basis

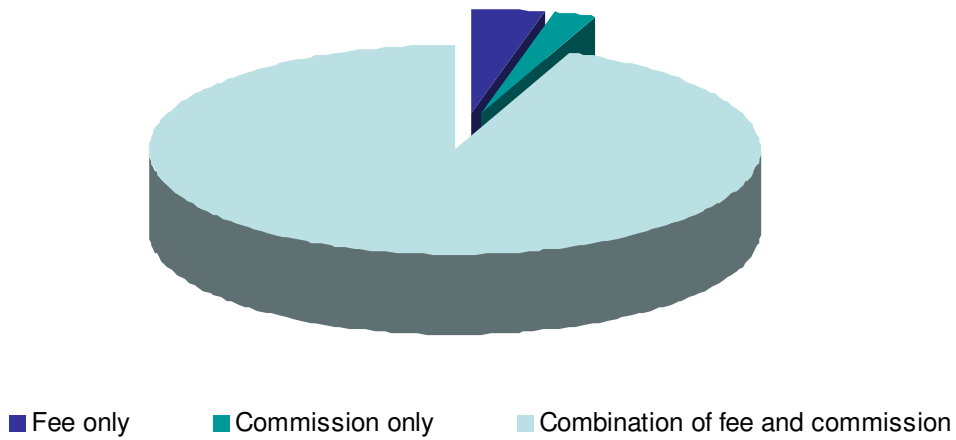


- Yes
- No
- Don't know

Base: All respondents January 2006 – December 2006 (1089)  
Q: Does any part of your firm now operate on a limited range basis (multi-tie)?

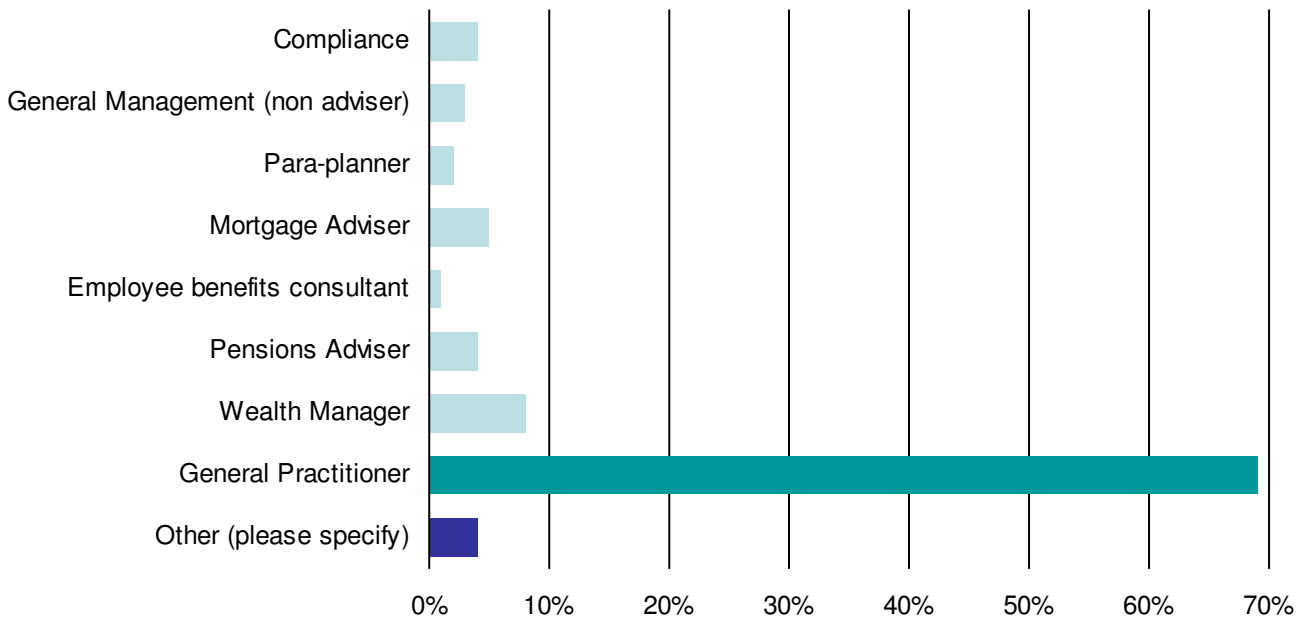
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## 9. Payment Options Offered



Base: All respondents January 2006 – December 2006 (1080)  
 Q: Which of the following payment options does your firm offer?

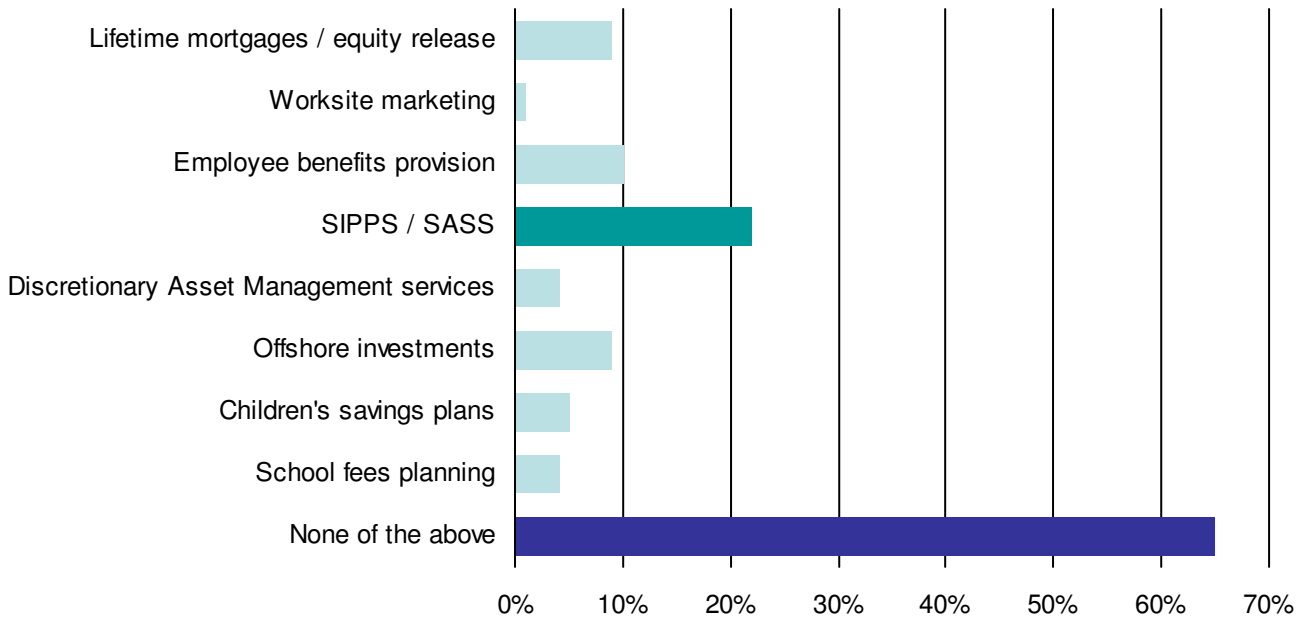
## 10. Role in firm



Base: All respondents January 2006 – December 2006 (1086)  
 Q: Which of the following most closely corresponds to your role?

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## 11. Specialised Area

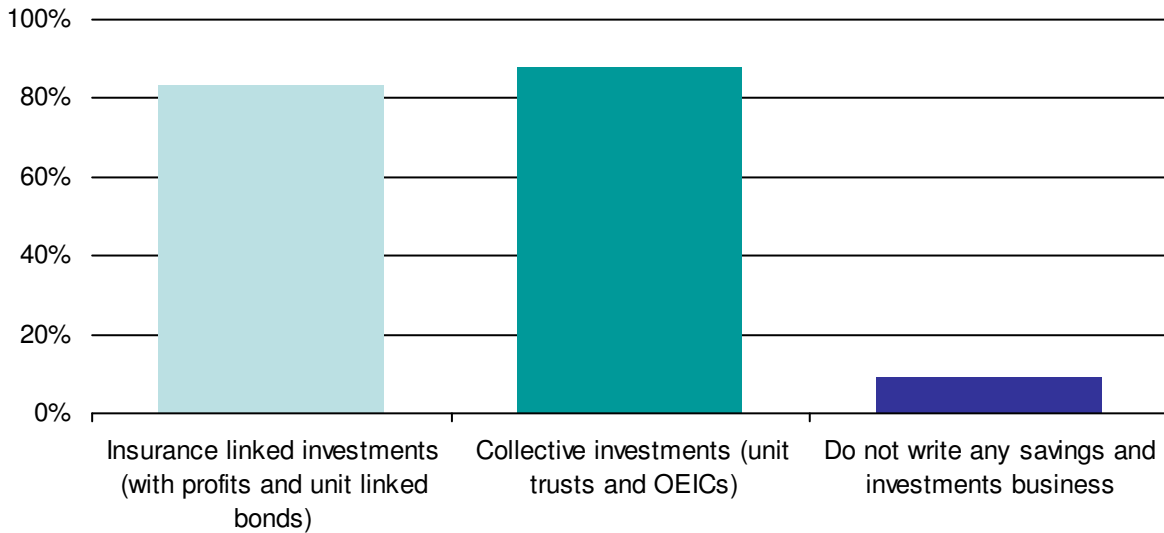


Base: All respondents January 2006 – December 2006 (1089)

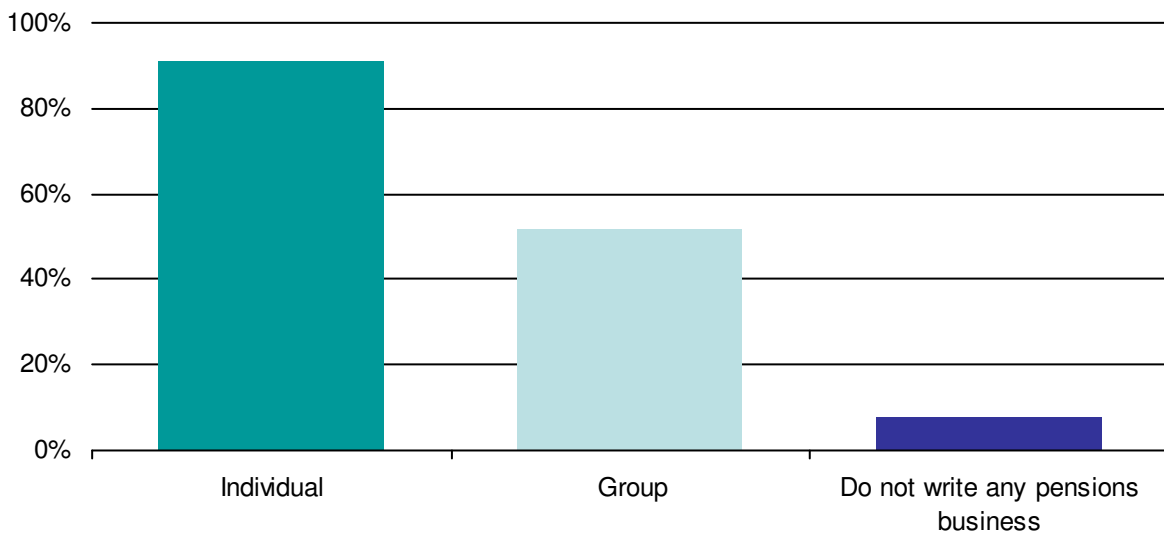
Q: Which, if any, of the following areas do you specialise in? (ie you have a particular focus in this area rather than dealing with it on an occasional basis).

## 12. Sectors Written

### Savings and Investments



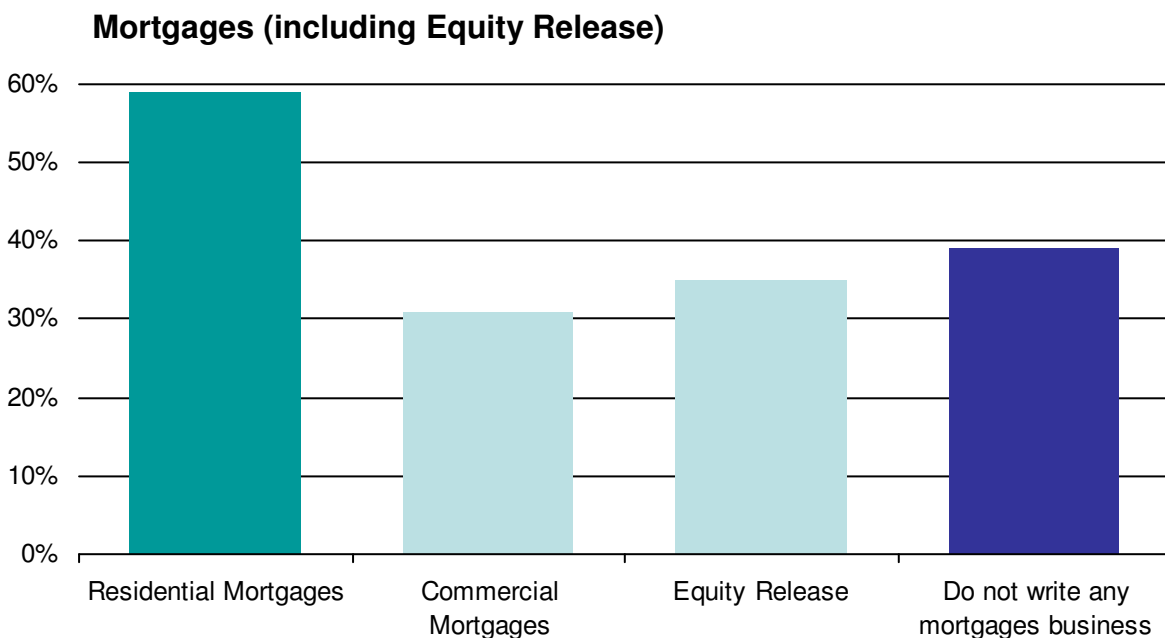
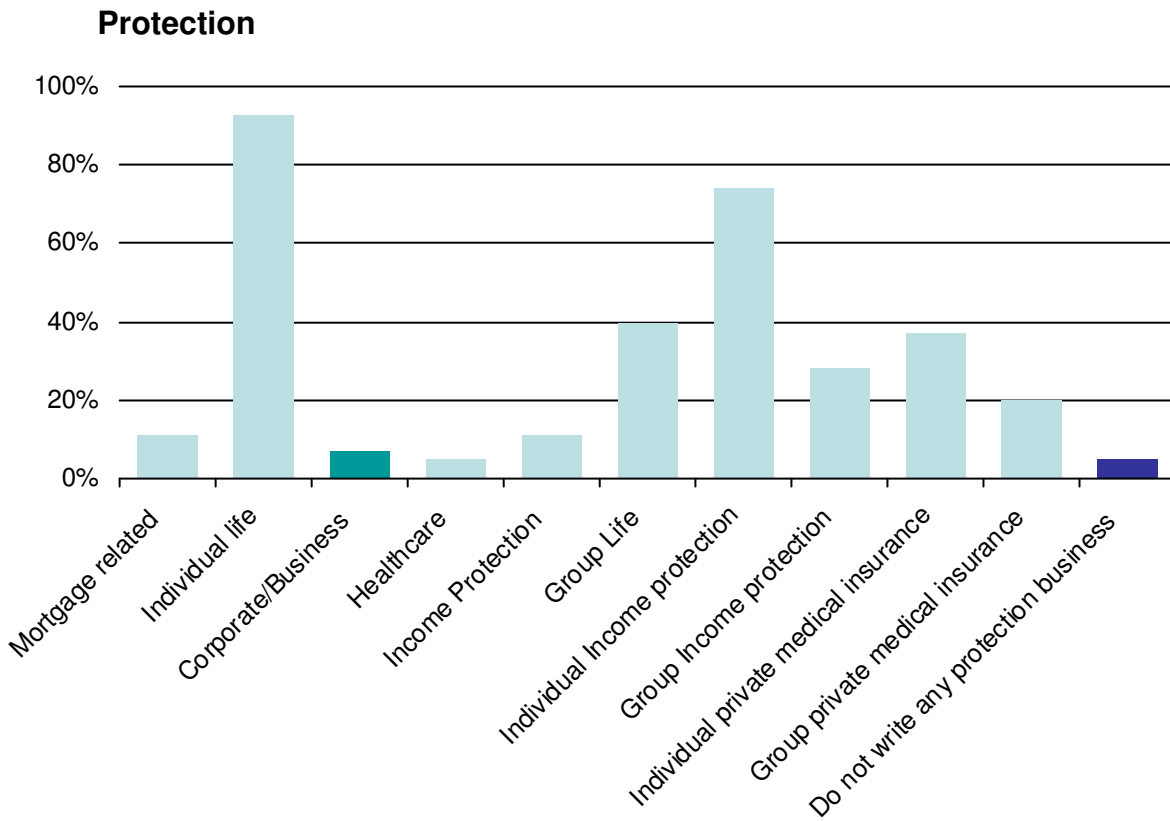
### Pensions



Base: All respondents January 2006 – December 2006 (1089)

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## 12. Sectors Written (cont'd)



Base: All respondents January 2006 – December 2006 (1089)

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