

# Use Lead Generation to grow your financial advice business

Supplying reliable, compliant, cost effective leads to Partners across the Industry since 2017.



Performance Leads  
High Intent Client Acquisition

	REGIONAL PARTNERS	SPEND	COMMISSION	ROI
Q2 + Q3 2025	Partner in Central England	£2,400	£10,800	4.5
Q2 + Q3 2025	Partner in London	£12,480	£36,000	2.9
Q2 + Q3 2025	Partner in Midlands	£7,040	£17,000	2.4
Q2 + Q3 2025	Partner in North West	£7,400	£18,100	2.4
Q2 + Q3 2025	Partner in Nottinghamshire	£4,400	£9,100	2.1
Q2 + Q3 2025	Partner in South Coast	£8,700	£18,300	2.1
Q2 + Q3 2025	Partner in Central Oxfordshire	£18,600	£39,000	2.1
All 2025	NATIONAL PARTNER	£424,150	£1,302,140	3.07

- PENSION/FINANCIAL ADVICE LEADS WITH £50K MIN POT SIZE
- NO CONTRACTUAL TIE-INS
- 3 MONTHS FREE LEAD CALLING\*

\*new partners



# Success Stories

Join Our Best Performing Partners

I really think I would have struggled to get off the ground without Performance Leads and I highly recommend that new advisers with few existing clients look at this type of approach.

...

Excellent value for money and great service. I'm currently looking at a **ROI of around 400%** on gross initial fees alone, plus significant ongoing income and onward referral opportunities.

...

You genuinely have changed my life. I'm looking forward to growing our relationship for many years to come.  
Andy spent **£3,819** in his first 6 months with Performance Leads generating initial fees of **£17,650** & ongoing fees of **£4,339**

...

Just to let you know that I have had my best month with you so far. I received 14 leads and am doing business with 3 of these for **£12,000** initial fees and around **£5,000** ongoing.

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Year one ROI of **400%**. Cost per client acquired **£534**

## Shared MI from a regional IFA Partner

### Performance Leads Partner Performance

(6 months to Sept 2025)

	Number of Leads	Appt Rate	Cost of Leads	Total Fees	Return on Capital	FUM
<b>Total</b>	217	35%	£26k	£182k	7.9	£4.3m

# Trust

We are an established trusted partner of advisers from firms across the industry including

Quilter  
Financial  
Advisers

Age  
Partnership

St  
James's  
Place

my pensionexpert

BELGRAVE  
WINCHAM  
INDEPENDENT FINANCIAL PLANNERS

Silver Birches  
Financial Planning

castra

FAIREY  
ASSOCIATES LIMITED

joslin rhodes  
Pension & Retirement Planning

ROBERTSON  
& CRAWFORD



# The Product



High Intent Web Leads delivered in real time from our online partner portal to both yourself & the consumer.



Each lead is a consumer actively searching the web for financial advice with at least £50k in investible assets.



On Page Qualification, Gather Postcode, Type of Advice, Contact Details.



We identify consumers looking for Final Salary, Equity Release, Mortgage, Debt Assistance, State Pension, Benefits or Pension Credits & redirect them away from the financial advice proposition.

# About us



Performance Leads is one of the top 3 financial advice lead generators in the UK



3000+ leads per month



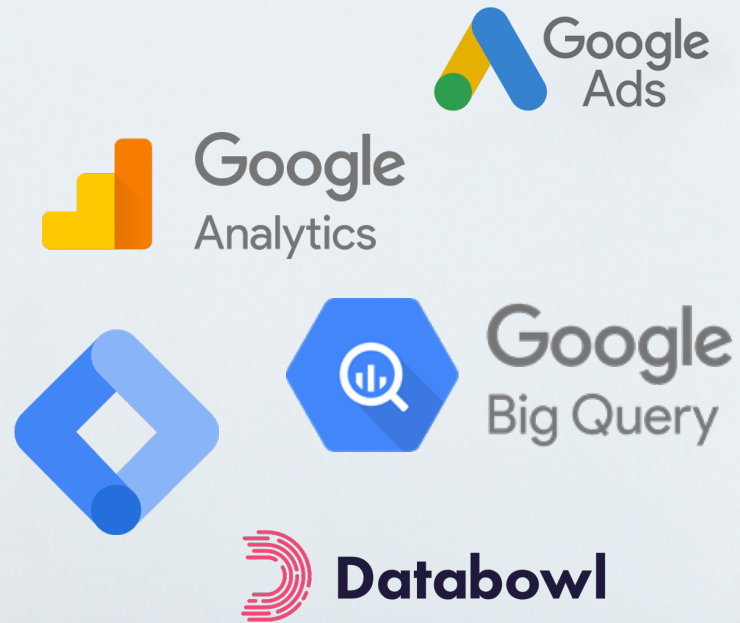
50+ years industry experience  
100+ partners



Offices in Harrogate & York



# How we do it?



## Multiple Layers

Ad Networks & Campaigns  
Websites  
Analytics  
Expert 3rd Party Advice  
Partner Feedback  
Bespoke Analysis  
Researcher Practitioner  
Model

# Partner Benefits



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Cost effective, Predictable Growth Scaler. Build your client base & your Funds Under Management



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Regular, reliable source of high quality leads



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Adjustable volumes of leads



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Location Targeted



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Proven model of success. Demonstrable metrics/MI



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Advice Type Filtered - only pay for the types of leads you want



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Proven source of referrals



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Great source of leads for newly qualified IFAs



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Reliable source of leads for an employed adviser



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Knowing you have a guaranteed number of high quality, high intent sale leads each month gives you the confidence to plan ahead in terms of cashflow, recruitment & infrastructure

# MI & Referrals

## Regional Partners

A Partner in Yorkshire & the North West spent £29,365 with Performance Leads generating initial fees of £87,325 & ongoing fees of £19,320. An in-year ROI of 197%

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I really think I would have struggled to get off the ground without Performance Leads and I highly recommend that new advisers with few existing clients look at this type of approach

...

A long term Partner in the South West spent £53,174 with Performance Leads generating initial fees of £122,906 & ongoing fees of £23,244. An in-year ROI of 131%

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I have been using Performance Leads for just over 12 months now, and they have presented me with some fantastic opportunities to work with quality clients, to enhance my client bank.

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**MAXIMISE  
PERFORMANCE  
WITH 3 MONTHS  
FREE LEAD  
CALLING\***

# The Nuts & Bolts

	FIXED	VARIABLE
Lead Mix	All leads £50k+ £180	No pot size gathered £140 Pot size £50K+ £180
Min monthly Leads	6	6
Min Postcode Areas per 6 leads	2	2
Lead Calling per Chargeable Lead from	£22*	£22
Notice Period	1 Day	1 Day

\*Fixed Lead Type Proposition only

**ALL PRICES ARE INCLUSIVE OF TAXES  
(where applicable)**

- £10 discount per lead when taking at least 12 per month
- Leads where fund size identified account for between a third and half of leads generated
- Pot size criteria is based on information provided by consumers on an online form
- Mortgage, Debt, State Pension, Pension Credits, Benefits, NHS, Final Salary, Equity Release - stripped out at source
- Invoicing - by DD mandate, weekly in arrears

## Replacement Policy

- No working ringtone
- Clearly invalid name - Daffy Duck etc
- Lead has less than £50k total in investible assets



Contact Rate **90%\***

Appointment Booked  
from contacted **58%\***

Appointment Booked  
from all leads **52%\***

\*Latest MI from 9000 Leads across  
Multiple Partners

**APPOINTMENT  
SETTING  
FROM £22  
PER LEAD**

## Appointment Setting

Max your performance with our Appointment Setting Service. Get your business in front of as many new clients as possible, leaving you to focus on creating new profitable relationships.

- Ensure you meet consumer expectations with a quick response to enquiries no matter how busy you are
- Improve your contact rates & appointment setting rates
- Our Service acts like an extra person in your team
- No contracts or tie ins

### The benefits of an Appointment Setting Service

	Valid Standard Leads	Cost Per Lead	Contact Rate	Assumed Appt Rate	Appointments	Conv Rate From Appt	Business (once matured)	Total Spend	Initial Rev*	Initial Profit	ROI
Appointment Setting	60	£202	90%	50%	27	50%	14	£12,120	£44,500	£28,380	234%
Unoptimised Call Strategy	60	£180	50%	50%	15	50%	8	£10,800	£22,500	£11,700	108%

\*average £3000 1st year revenue per completed case



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High Intent Client Acquisition

# Next Steps

To find out if we have availability in your area or if you have further questions please email at

[grow@performance-leads.co.uk](mailto:grow@performance-leads.co.uk) or book a Zoom call using the link below

[Book a meeting](#)

