



Aspiro  
ADVISER ACADEMY

from  
equity&general  
planning for life



# Aspiro

## Your Pathway to Becoming a Trusted Independent Adviser

Are you ambitious, talented, and looking for a career where you can make a real impact? Aspiro, E&G's Adviser Academy, is designed to fast-track the next generation of independent financial advisers. As the newest addition to our Partnership Programmes, alongside Altro, Securo, and Fiducia, Aspiro provides a unique pathway into one of the most rewarding and respected professions.

Aspiro is more than just training; it's a structured career opportunity. You'll gain real client-facing experience from day one, develop the professional skills needed to succeed, and be supported through qualifications that lead to fully accredited adviser status. From there, the journey doesn't stop—our model gives you the chance to grow your own client base, share in the long-term value you create, and ultimately, progress towards business ownership if that's your ambition.

In short, Aspiro is built to give bright individuals the platform, support, and opportunity to become the trusted advisers of tomorrow—equipped with the skills, technology, and confidence to thrive in a rapidly evolving profession.





## Key Features

- Career Pathway – Begin as a Client Relationship Manager (CRM), gaining hands-on experience by re-engaging clients, completing fact-finds, and helping to shape financial priorities.
- Skills Development – Early exposure builds trust, communication, and problem-solving skills, while giving you valuable insight into client relationships.
- Qualification Support – Sponsorship through professional exams, plus mentoring from experienced advisers.
- Progression Built-In – Transparent pathways to adviser status, with opportunities always offered internally first under our “inward-first” recruitment policy.

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- Client Ownership – Advisers develop their own client base, with ring-fenced clients and an allocated share of assets under management (AUM).
- Ownership Opportunity – A structured route to joint ownership of an E&G Appointed Representative firm, progressing to 100% over time.
- Technology Advantage – Tools and training to become part of a new generation of advisers: tech-savvy, AI-supported, and able to serve a wider, more diverse client base.





## Why E&G?

Aspiro isn't just another graduate programme—it's a career launchpad within one of the UK's most trusted advice businesses reflecting our commitment to building not only businesses but people.

We are known for:

- Supporting ambition – exam sponsorship, mentoring, and structured progression.
- Backing our people – 95% of our team have joined through referrals, not recruiters, reflecting loyalty and cultural fit.
- Aligning rewards with commitment – from sharing AUM to eventual ownership, your success is directly linked to your effort and longevity.





## Why This Matters to You

The advice profession faces two pressing challenges: an ageing adviser population and a growing advice gap. Aspiro bridges both by preparing ambitious, talented individuals to become tomorrow's trusted advisers.

For you, this means:

- A career with real impact, helping clients shape their financial futures.
- The chance to learn from senior advisers while developing your own professional identity.
- A pathway to ownership and autonomy, with the infrastructure, compliance, and technology of E&G behind you.

Aspiro offers more than a job—it offers a long-term career opportunity, empowering you to grow from trainee to adviser, and eventually, to business owner.

## Let's Talk

Discover how Aspiro can fast-track your journey to becoming a trusted adviser and help you build a successful, rewarding career in financial services.

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