

The logo for Bray Leino, featuring the company name in white text inside a blue house-shaped icon.

LEGAL & GENERAL

Estate planning in a changing market landscape

As a leading provider of investment and insurance solutions, Legal & General wanted to reach out to valued financial advisers following the enforcement of the Retail Distribution Review (RDR) – one of the biggest overhauls of financial regulation since the Financial Services Act was introduced in 1986. Legal & General was keen to better understand the challenge for advisers using estate planning solutions for their clients. Launched by the Financial Services Authority, RDR targets the quality and standard of financial advice and aims to deliver a transparent and fair charging system. Creating large scale change within the industry, Legal & General was eager to understand advisers' approach and views on estate planning in light of RDR in order to provide

effective guidance as well as drive future communications.

Table Talk

Our PR team jumped in and proposed a roundtable event for key adviser accounts to openly discuss the market, client needs, and support needed from financial services providers such as Legal & General. Working closely with Legal & General's Retail Savings Marketing team, Bray Leino organised the high-end roundtable at the top of The Gherkin in the heart of London's Financial District. The event was facilitated by Nadine Dereza, a reporter for the BBC and CNN named 'Financial Journalist of the Year'. Two leading industry titles - Professional Adviser and New Model Adviser – were secured to report on the debate which was also filmed and edited for use across a range of marketing channels.

The result?

An oversubscribed event plus further webinars secured with *Professional Adviser*. Crucially, we have been able to profile key Legal & General spokespeople and create new collateral in the form of photography and video for use across the rest of the year.

Say hello...

Let's talk, chat, email, however you like to make things happen.

01598 760700 or email hello@brayleino.co.uk

MORE WAYS TO CONTACT US

PRIVACY
COOKIES
MODERN SLAVERY ACT

Copyright © 2022 Bray Leino Limited.

All Rights Reserved.

