

# Benchmark



## Fair Value Statement

Firm Name: TeamChurchills

October 2025

# About Us

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## Introduction

This document is aimed at providing you with a brief overview of our firm and to introduce our services.

In this document, we intend to illustrate how we assess value and whether there is fair value between the total price of the service and the benefits and their quality that our clients receive.

TeamChurchills are a boutique consultancy led by five key members who have combined experience of over 100 years in the Employee Benefits sector.

Our expertise covers the full spectrum of group benefits, enabling us to help your business identify solutions that align with both your immediate needs and long-term objectives. We specialise in creating and implementing tailored Employee Benefits strategies designed to support your growth, strengthen employee engagement, and ensure you attract and retain top talent.

Our service proposition has been designed to meet the needs and objectives of our clients and to ensure fair value is received by engaging with our service.

Our target market includes start-up companies and organisations that prefer the personalised approach of a boutique firm offering high-quality, tailored Employee Benefits programmes.

TeamChurchills Ltd specialises in delivering compliant Workplace Pension and Employee Benefits plans tailored to the needs of UK companies, predominantly SME's. We offer expert support for organisations seeking to outsource their Employee Benefits function by providing a dedicated corporate and employee assistance programme.

By partnering with TeamChurchills, clients experience efficient solutions and clear strategies that deliver measurable results. Our clients value the peace of mind, confidence, and clarity that comes from having a trusted Employee Benefits Consultant on their side one who understands their goals, anticipates their needs, and works in partnership with them to achieve long term success.

## The Value of our Service

### Network Member Firm Business – Best Practice

- The Network provide an institutional regulatory supervision and compliance framework service which provides us with a high level of regulatory assurance and leading-edge client management systems.
- This high quality and financially sound organisation ultimately provide us with a high level of assurance and comfort around the regulatory framework of the proposition and services we deliver to you, our clients.
- By leveraging the quality and services of an organisation like Benchmark, a Schroders plc group company, we have comfort that we will remain at the leading edge of our profession, ensuring we maintain a “Best Practice” approach to serving our clients. Many of the benefits we derive, we see as having direct value and relevance for our clients, including:
  - The provision of an independent complaints handling process for all of our clients,
  - Enhanced professional indemnity insurance
  - Integrated client technology systems, including the Wealth Platform
  - Independent compliance supervision of our advisers and the suitability of our client advice.

## Providing Advice on Employee Benefits

- We review and refresh your benefits on a regular basis. We recommend annual reviews to ensure your benefits remain competitive, cost effective, and are aligned with employer needs and business goals.
- We design benefits packages that align with your workforce demographics. We help you analyse your employee based by lifestyle, and financial priorities to recommend benefits that resonate, from healthcare to family friendly perks or wellness initiatives. This creates a more relevant and inclusive benefits package by addressing the real needs of your workforce and increases employee satisfaction and uptake
- With regards strategic benefits planning, our consultancy ensures your benefits spend delivers measurable value boosting retention, improving employee satisfaction, and enhancing your employer brand in a competitive market.

## Technology

- One of the reasons we chose to work with Benchmark was their technology. Something they have won numerous awards for. Ultimately backed by Schrodgers, we have every confidence that the security of our client's information within Benchmark's client management technology systems, is in very safe hands. This decision is something we know our clients expect us to get right. It's incredibly important to them and a reason they feel safe working with us.
- Our client management system adds value with systems that enhance adviser efficiency, enabling faster response times, more accurate information, and a more personalised service. This leads to a smoother client experience, stronger relationships, and better outcomes for our clients
- With regards client technology, our online portal adds significant value by offering real time access to benefits data, streamlined administration, and intuitive dashboards. Clients benefit from features like employee self service, automated enrolment, secure document storage, and instant reporting, all of which improve efficiency, reduce errors, and enhance the overall client experience.

## Maintaining professional competency

- As an Employee Benefits Consultancy, each year we evidence the learning activities we have completed to maintain competence in our role and improve our knowledge This helps us maintain our professional knowledge and keep up to date with regulatory and tax changes.

## Summary

At TeamChurchills, we deliver holistic value by combining deep sector expertise, strategic planning, and award winning technology to create tailored Employee Benefits solutions that truly support our clients' goals. Our commitment to regular benefit reviews ensures your offering remains competitive and cost effective, while our boutique approach ensures relevance and inclusivity. Strategic planning underpins everything we do, ensuring your benefits spend delivers measurable outcomes like improved retention and employee satisfaction. Backed by the regulatory strength of Benchmark and Schrodgers, and

supported by secure, intuitive client technology, we offer peace of mind, clarity, and a trusted partnership that evolves with your business.

Considering all areas included in the assessment of value, we believe the service provided is demonstrating value overall and our service proposition along with this value statement has been approved by our network, Best Practice IFA Group Limited.

**Important information:** TeamChurchills is an appointed representative of Best Practice IFA Group which is authorised and regulated by the Financial Conduct Authority, registration number 223112. Registered office: Broadlands Business Campus, Langhurst Wood Road, Horsham, West Sussex, England, RH12 4QP.