VISION | IFP

Independence, Excellence and Integrity

The UK's Exclusive Adviser Network

BEST FINANCIAL ADVISERS TO WORK FOR 2023

WINNER

Vision Independent Financial Planning

PROFESSIONAL ADVISER AWARDS

Best Financial Advisers To Work For – Winner 2023
Best Financial Advisers To Work For – Winner 2022
Best Advice Network – Winner 2022
Best Network – Finalist 2020

CYBER ESSENTIALS CERTIFIED

“Welcome to Vision and may we take this opportunity to say thank you for spending the time to see how our company can benefit you in succeeding as a high-calibre independent financial adviser in today’s industry. Vision was formed out of strong foundations in our core values which we believe in and they continue to prove the basis for a dynamic and successful network. We would like to share these with you which should hopefully give you an understanding into our approach and set the scene for your journey with Vision.”

Paul Sweaton, Founder

“*Wealth Planning is personal. It requires a tailored approach.*
Our clients and their aspirations are principle in all our decisions.”

Our **Values**

Independence
We are fierce advocates of independent financial advice, to empower our network of advisers* with the freedom of choice, to truly deliver the best outcomes for their clients.

Excellence
We aspire to perform and give the best of ourselves. United in our common bond of excellence, good just isn't good enough.

Integrity
Fairness, honesty and trust are the foundations on which we build and create strong, long-lasting relationships, with care, collaboration and inclusion at the heart of everything we do. It's the culture we live and breathe by.

About **Vision**

Founded in 2008 and headquartered in the Southwest where the company started, Vision IFP is a nationwide, dynamic and established network with quality advisers servicing high net worth clients.

Our 3 core values feed our culture and support our purpose. They resonate through our everyday actions and how we carry them out. With excellence our standard, we make progress through our aspirations. Trust, Transparency and Honesty are integral to the relationships we build.

Our award winning, relationship focused proposition is what makes us stand out from the crowd.

Proven **Results since 2008**

2008 In the middle of global financial crisis, at the moment Lehman Brothers filed for bankruptcy, Vision laid down the foundations for what is now a highly successful award-winning independent financial advice network.

2012 Navigating and overcoming the challenging economic environment Vision relocates from Maritime Quay to Vision House. The enhanced facilities supported the growing team, signalling expansion and progress.

2013 Winning the Best Business Award was the first of many significant milestones. The award acknowledged the delivery of exceptional service, excellence, and leadership within the industry.

2016 Vision reaches £1 billion in assets under management, surpassing a notable milestone. This achievement highlights Vision's solid position as a trusted and reliable independent financial advice network.

2017 The 100th adviser joins the Vision network demonstrating expansion and increasing influence within the industry. This milestone signifies Vision's ability to attract and empower like-minded independent financial advisers.

2019 Vision experiences substantial growth as assets under management reach £2 billion, a significant milestone reflecting the commitment to building strong relationships on the foundations of trust, transparency, and integrity.

2021 The Vision Acquisition division is launched, focussing on strategic acquisitions in pursuit of new growth opportunities and further expansion throughout the UK.

2023 The growth continues. Vision reaches yet another significant milestone with a remarkable 136 Advisers and £3.8 billion in assets under management, solidifying its reputation as a trusted and successful player in the financial industry.

Our **Purpose**

To empower our independent financial advisers with the freedom of choice, to offer their unique client base the best of opportunities to reach their financial goals.

Our **Long Term Goal**

To grow, support and sustain our nationwide network of first class independent financial advisers, who are committed to helping people build sound financial security.

Our **Values**

Our values are what feed our culture and support our purpose. They resonate through our everyday actions and how we carry them out. With excellence our standard, we make progress through our aspirations. Trust, transparency and honesty are integral to the relationships we build. We champion authenticity and integrity.

Being Independent does not mean going it alone.

Our award winning, **relationship focused proposition is what makes us stand out from the crowd**

Our **highly experienced team** of industry professionals are committed to **supporting your transition and navigating your journey to success with care and confidence**. Whether you are becoming independent for the first time or building a retirement plan, we offer a large selection of professional resources for you to leverage.

We are **committed to Independence** now and in the future and you will have a choice over the providers, platforms and products you use, and always will.

Our advisers choose Vision because they share in our philosophy. **We proudly have high standards, we only want to work with the highest quality independent financial advisers**, so you can be sure you're in good company. Not only that, but you will also be supported by our award-winning head office team, who always go the extra mile.

Your business is UNIQUE, so are we.

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Want to be self-employed **with a great support network around you?**

Independent Financial Advice

As the financial landscape evolves, people's financial needs become more complex and sophisticated. Our main goal is to provide the ideal home for our highly experienced independent financial advisers, where they can be certain that they have access to the best support and resources our network has to offer, allowing them to focus on what matters most: serving the best interests of their clients.

> *I always hoped to run my own business and for many years in an employed Financial Adviser role, I never knew how that would be possible. Vision made that transition seamless by providing support above and beyond anything I've experienced in the industry before.*
>
> **Ravi Ruparel – RR Wealth Management Ltd**

Bespoke Technology

We believe that wealth planning requires a personal and tailored approach. For the same reason, we have created our own bespoke back-office system to manage all aspects of the financial advice process which allow access by all parties at different levels of the advice process. Our small powerhouse team of IT professionals are always on hand to guide you through our comprehensive suite of bespoke technology solutions. Having created a back-office system with an adviser-centred approach, their focus never waivers as they continue to strive for further cutting-edge advances.

Investment and Due Diligence support

There is no such thing as a one-size-fits-all solution. We provide you with access to some of the most trusted investment providers, whom we are proud to have on our panel as strategic partners. Our Investment Committee of highly experienced industry experts are dedicated to building and growing this valued relationship on the foundations of transparency, trust, and integrity, with a shared goal of consistently offering you with the highest quality investment offering that will support your unique client base. Professional quarterly due diligence is completed on our panel DFMs and shared in order to support you in making your recommendations and to ease some of the administrative burden associated with this requirement.

Success is achieved through dedication.

Working with and joining the Vision network was very straightforward and simple. I felt supported in my every move from an employee to a self-employed business owner. I have never felt so passionate and happier in my career. I love being my own boss, and the flexibility that comes with this. I've finally achieved the work / life balance I've always desired.

Reshma Patel – H2N Wealth Management Limited

Vision Adviser Review Service (VARS)

VARS is a specially trained team of in-house report writers who can complete your pre-review preparatory work and write your post-review letters. It is available as a subscription service, should you opt to pay for this administrative support. Our highly skilled team of report writers are committed to driving an efficient and effective workflow so you can focus on writing new business and reaching your business goals. Instant access to internal systems and intelligent bespoke technology gives this talented team the upper hand over any external support in completing your pre and post review letters

Making the decision to leave HSBC was not easy – I was walking away from a salary, job security, friends and colleagues to name a few BUT, it was 100% the correct decision. Six years on, I love being my own boss and have built up a really good business. I now employ an assistant and continue to grow my client base.

Kath Atkin-Bowdler – Kath Atkin-Bowdler Financial Services Ltd

Client services support

Our award-winning client services team are focused on implementing best practices built on trusted and collaborative relationships. They love connecting with our advisers and championing our core values through their everyday actions, taking pride in achieving a resolution to every query that comes their way.

Success is achieved through culture.

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Right from the start I knew Vision was a great fit for me. They are friendly, supportive, all working in the same direction. I love the autonomy of being able to run my business my way and also being able to decide on my work /life balance. This has been life changing!

Victoria Toan – VJT Wealth Management Ltd

There are some inspirational advisers at Vision who have built some great businesses, and all are generous with their time on passing on advice, I really feel like everyone is on your side and willing you to succeed. I have found the move to Vision life changing to me and my family and now feel like I have a great work/life balance, spending a lot more time with the family. I would recommend that any advisers thinking about joining to go for it and take that leap of faith.

Simon Field – Valere Wealth Management Limited

As a business, Vision is a 'can do' Network and will do everything they can to support and assist new and existing advisors. Compliance and evidencing recommendations are massively important, which has helped Vision stay on the right side of the Regulator and be commended for good practices. I now have an established business and despite the increasing amount of bureaucracy faced by our industry over the years, I still love the role and looking after my existing clients in a compliant and professional manner.

Neil Niven – Solid Financial Solutions Ltd

My regional business manager was there for any and every query I had when starting with Vision. This varied from the transition to running my own company, to client engagement and providing best in class advice.

Nikki Zammit – Realise Wealth Management Limited

Success is achieved through principles.

Network Costs and Fees

Have peace of mind with our transparent charging structure, which includes an attractive maximum annual network capped fee. Our business model allows for a competitive proposition for you to enjoy potential uncapped earnings. All regulatory fees are included as standard, there will be no ‘hidden’ or ‘additional’ fees.

Branding

At Vision, you will have access to our digital marketing partner Channel Digital, who are 100% focused to helping businesses grow their branding online through a professionally designed website. We understand how a well-designed distinct brand can elicit emotions, inspire trust and reach the intended audience. By investing in your brand and focusing on what you do well, you’ll be on your way to projecting authenticity and growth.

Positive Compliance Support

Our dedicated team of compliance professionals ensure Vision navigate through the continual regulatory changes, giving you peace of mind that your Appointed Representative business is fulfilling regulatory requirements and industry standards while you focus on providing high quality advice to your clients. Full Professional indemnity insurance cover is arranged and included for you. A robust compliance framework combined with passion, commitment and industry experience will guarantee you the security to future proof your business with confidence.

Dedicated Supervisory Support and Development

Becoming an independent financial adviser may appear to be an overwhelming task, with new technology and processes to choose from our supervisory team of industry experienced professionals will be there for you from the moment you onboard. Your assigned supervisor will be responsible for your in-house business development and quality CPD training, underpinned with continual support through our policies and procedures that connect the day-to-day functions between Compliance and Operations.

Succession Planning

Helping your clients achieve their desired financial goals leaves little time for you to pursue your own. Our team of experienced professionals understands how to transition your business and support you in achieving your desired goals through a fully transparent process that includes all the necessary steps to create new opportunities for you and your clients with confidence. We have in place an exit strategy that comes with a highly successful track record for when you decide it's time to retire and will support you throughout the process of identifying and developing a succession plan to secure the continued success of your business and maintain excellent, unchanged Vision service for your clients and promote clarity and consistency through peer-to-peer idea sharing.

Exclusivity

We choose to work with like-minded people who value independence, strive for excellence and are committed to helping people build sound financial security. We foster a values-based professional environment and recruit advisers who share our work ethic and are very proud of our positive and supportive client-centric culture.

Discretionary Fund Managers

You have the option to use our panel of industry leading Discretionary Fund Managers with whom we have negotiated terms and fees and completed the necessary due diligence on your behalf. Together with their expertise and a wide range of investment resources, research, and analysis at your disposal, you can take comfort knowing that better informed decisions aligned with your client's investment goals will ultimately result in a more effective and efficient investment strategy.

Networking

Connecting with peers at events and conferences can be a powerful tool to share knowledge and best practice. We aim to give you the platform to network regularly, to build camaraderie and promote clarity and consistency through peer-to-peer idea sharing. Our goal is to give you access to industry events, seminars and workshops in order to obtain the most up-to-date market insights and exposure to the comprehensive services that have the potential to increase your business growth.

Connect with Vision

Hopefully the information given here has provided you with an idea of who we are, the values we believe in and more importantly how we may be able to help you.

Our website is also a good source of further information and, if you'd like to get in touch with us, you'll find a simple contact form there to complete and we can do the rest.

On the website you can also access our financial literature and other publications as well as sign up for regular email updates.

*Where 'adviser' is stated, this refers to individuals who are authorised as an Independent Financial Adviser via an Appointed Representative of Vision Independent Financial Planning Ltd.

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