

MONTHLY MATTERS

JANUARY 2024



Introduction

It is officially our 25th birthday year! We are very proud to have achieved this quarter of a century milestone in business and one we can't wait to celebrate with you all.

This year we will be featuring stories sharing the history of Wealth Matters, including finding out from Julian what inspired him to set up the business, Bruce Nash's key points from 24 years of Financial Planning and why they call their working relationship their 'work marriage' (which I am sure a lot of our Director clients can relate to).

We will also be sharing our goals for the future with our development of WRAPS+ and the career progression of our staff.

Most importantly, we will be sharing our gratitude to our wonderful clients, of whom some have been with us from the very beginning!

Our 25th birthday articles will start next month, so please keep a look out.

In this Newsletter, we will be sharing some Award Updates for our team, we have an interview with Alison, one of our Client Relationship Managers who will be discussing all things Customer Service and of course it wouldn't be a Newsletter without an update from our famous Morale Officer Toby!



Wealth Matters

CELEBRATING 25 YEARS



WHAT'S NEW

TEAM NEWS

- Our Latest Award Announcements
- Why Customer Service Is So Important To Us
- Our Staff Recognition Awards

MONEY MATTERS

- End Of Tax Year Reminder

DOG TALES

- What Has Toby Been Up To?

Industry Awards Announcements

We've had a lot of exciting news recently about various awards that Wealth Matters has been shortlisted for. Here are all the details.

Citywire New Model Adviser - Best Financial Planning Firm in the South East

We are very proud to have been nominated by Citywire as one of the best Financial Planning Firms in the Southeast. We have been shortlisted again as a Finalist for our outstanding service to clients, for developing our client proposition with the evolution of WRAPS+ and our pro-bono Financial Planning workshops to help the community where possible. It is a fantastic achievement to be recognised, and one that shows the commitment of our entire team.



Professional Adviser Awards Young Achiever of the Year Award

Having been shortlisted as a Finalist in 2023 for the 'Newcomer of the Year', Cameron McKay has now been recognised in the 2024 Professional Adviser Awards as one of the best in the industry, this time in the 'Young Achiever of the Year' category. Cameron has gone from strength to strength in the last 12 months following his graduation from our 'Learning for Life' programme as one of our Financial Planners. Congratulations to Cameron for this wonderful acknowledgment, it is great to see his hard work and his dedication to the clients being recognised industry wide!

Professional Adviser Awards Best Adviser Marketing Initiative

We are a finalist for Best Adviser Marketing Initiative for our in-house newsletter Monthly Matters (which you are currently reading) after its launch in 2023, and also for our series of informative webinars about issues affecting our clients and the public in general. These initiatives have been recognised for their personalisation and our determination to help our clients to understand who we are as a business and how we operate in a relaxed and interactive way. Toby does seem to think its his regular feature that has helped us to be recognised!



Chris James and his Client Relationship Manager, Katie

VouchedFor Certificate of Excellence

Chris James has been recognised by professional services review platform VouchedFor with a Certificate of Excellence, for his work with clients and has been listed in the *The Times* newspaper as a Top Rated Adviser. Over 46 clients in total have provided Chris with testimonials for his Financial Planning work, and although it is wonderful to be recognised by Industry Experts, it is even better for a Financial Planner to have such positive feedback from his own clients.

Why Customer Service Is So Important To Us

At Wealth Matters, the client is at the heart of everything we do - every decision we make is with the client in mind. To some extent every firm has to think of the clients, but we believe that our dedicated approach sets us apart in this respect.

We asked Alison Howe, one of our Client Relationship Managers, for her view on why customer service is so important at Wealth Matters.



Hi Alison. You're on the front lines working with clients every day - why is customer service so important to you?

Since I'm in a service role, it is very important to me that clients are happy with how I work with them. Treating each client as I would wish to be treated, as an individual rather than a number, is really important. Great service promotes trust and, in turn, better communication.

One of our company values is 'make the client love you'. What does this mean to you?

To me this means forging and building relationships with clients based on trust and knowing our client inside out. It's about authentic person-to-person relationships.

Does that mean you like to get to know all the clients you look after? If so, why?

Absolutely. Building relationships with clients is important to me. I want all clients to feel happy to contact me with any questions they may have and knowing me well makes them feel more comfortable to do that.

What can a client expect when they visit the Wealth Matters office for their review meetings?

We have a designated parking space for clients when they visit, right outside the office door. They will be greeted at the door and warmly welcomed by our staff. We'll have tea or coffee and biscuits ready and waiting. We want all client visitors to have an enjoyable, personal experience when they visit us. If Toby is around, they can also enjoy some canine company!

Do you feel that our company stance on customer service sets us apart?

Definitely. We really value our clients and appreciate the trust they place in us. Outstanding service is our way of repaying this.

Our Staff Recognition Awards

We recently presented our 2023 Staff Awards, in recognition of the team's hard work last year. We would like to share two in particular with you.

Employee of the Year was awarded to Chris James, and Good Egg of the Year was awarded to Thusha Thurairatnam.

We interviewed them to find out how they feel about their accolades.

Chris, were you surprised to be awarded Employee of the Year from the management team?

Yes, very pleasantly surprised. I didn't expect it because the standard of staff at Wealth Matters is one of the highest of any place I have worked. It has been a nice way to end a really exciting first year.

You joined Wealth Matters in January - what is your favourite thing about the company so far?

Working alongside such great colleagues has been fantastic and I would not have been able to do what I've done this year without their help and support. I know I am part of a passionate and dedicated team, and knowing that such dedicated staff are here to support my clients is really important to me.

What are you looking forward to at Wealth Matters in 2024?

I'm looking forward to spending more time in front of existing and new clients. It's the part of the role I enjoy the most and something I feel privileged to be able to do.



Thusha, you were voted Good Egg of the Year by all the staff. What does being a 'good egg' mean to you?

For me, it is someone who highlights one of our company values: 'be a great team player'. I enjoy being available for my colleagues to help them and creating a synergy between the departments.

How does it feel that the staff voted for you as the winner of this award?

I am very honoured. I feel grateful that staff see me in this manner, it gives me a great sense of accomplishment to know I am someone the staff feel they can approach for help.

What are you looking forward to in 2024?

We are working on a big project called the 'Client Experience Project' in 2024. I love that we are always striving to achieve excellence in our client service and I'm looking forward to being a part of the design team for this.

I also have two holidays booked next year, and I am looking forward to relaxing in the sunshine!



End of Tax Year Reminder

We would like to remind all our clients of the opportunity to use your ISA and Pension allowance before the end of this tax year. 5th April 2024 is just around the corner and now is the perfect time to contact us to ensure you have utilised your allowances. Please remember that if you do not use your ISA allowance in the tax year, you will lose it as you cannot go back and fill previous years' allowances.

Your Client Relationship Manager is always on hand to answer any of your questions or book in a meeting with your Financial Planner. Please do not hesitate to contact them.



Debbie Pacey



Alison Howe



Katie Whitley



Chantelle Stemarthe

Dog Tales

Toby has been working very hard in January to ensure that he is recognised for an Award this year for his role as 'Morale Officer'. He hasn't once been caught stealing a lunch, has only snored loudly in two meetings, and hasn't barked at the postman yet!

He is almost a new dog. We all wonder how long he can keep this up for, has he changed his ways permanently or has everyone been working too hard to notice any shortcomings?

Very hard to notice when you have that cute face staring up at you.

Whatever resolutions you have set for January, we hope you are achieving as much success as Toby!



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