

Vision

INDEPENDENT
FINANCIAL
PLANNING



CLEAR VISION.
BESPOKE ADVICE
FOR OUR CLIENTS



CORNWALL BUSINESS AWARDS Winner Entrepreneur Business 2014 • Silver Business Leader 2014 • Silver Most Dynamic Growth 2014 • Silver Most Dynamic Growth 2012



MONEY MARKETING
AWARDS
Shortlisted for Best IFA
Network 2012



INVESTMENT LIFE & PENSIONS
MONEYFACTS AWARDS 2013
Commended – Investment Adviser
of the Year



BEST OF THE BEST BUSINESS
AWARD 2013
Outstanding Business
Achievement



Hallmark of Innovation
Financial World Innovation Awards
Finalist – 2013



INVESTMENT LIFE & PENSIONS
MONEYFACTS AWARDS 2014
Finalist – Investment Adviser
of the Year

Welcome

Welcome to Vision and may we take this opportunity to say thank you for spending the time to see how our dedicated team of independent financial advisers can benefit you in providing you with a tailored and professional financial advice service to meet your needs. 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 financial advice firm. We would like to share these with you which should hopefully give you an understanding into our approach and set the scene for your experience with your Vision adviser.

Vision Values

- **Trustworthy, Honest & Ethical** – an ethical approach to client service that is fair, honest and trustworthy acting with integrity and transparency at all times
- **Respect** – we respect all of our clients and treat them in line with the Treating Customers Fairly principles as laid out by the FCA (Financial Conduct Authority)
- **Dynamic** – we are a fast moving expanding business, able to react quickly to client and business needs
- **Dedicated** – clients have access to a dedicated and experienced independent financial adviser which means that there is a continual relationship for present and future financial needs
- **Professional** – choice when it comes to how, where and when you want to discuss financial matters but always in a professional and friendly manner
- **Positive compliance** – we take compliance very seriously and view it as a positive mechanism to ensure the right advice is being delivered to our clients
- **Independent** – totally committed to independent financial advice which means choice and access to every financial solution giving the client a comprehensive and fair analysis of the relevant market

Independence



About Vision

Vision Independent Financial Planning Ltd (Vision) is a dynamic and established network with clients and advisers throughout the country and a head office base in Falmouth, Cornwall where the company originally started. We are directly authorised by The Financial Conduct Authority and provide an independent financial planning advice service to a range of private clients, corporate clients, charities, trusts, court of protection clients and professional advisers. Our advice is offered on a completely independent basis with no restraint or commitment to any products or providers. This allows the provision of the most appropriate advice from the whole of the market to Vision clients, based entirely on their individual needs whilst utilising their adviser's extensive experience in the financial services industry.

Vision was formed out of a desire to offer a fully independent, high quality service to clients and remains committed to delivering a truly tailored financial planning advice offering via our team of very experienced independent financial advisers.

All of the team have joined us because they share in our company philosophy – a passion and determination to provide the most appropriate financial advice and support, backed up with regular contact and strong administrative skills. Many of our clients are a result of personal recommendation from existing and very happy clients, which we take as a huge compliment and endorsement of our personalised approach.

- **A dynamic, established and award winning business**
- **Committed to remaining independent**
- **Freedom of advice giving you choice and access to the relevant markets bespoke to you**
- **Customer overall satisfaction levels of 97% and 90% of customers willing to recommend**
- **A dedicated experienced independent financial adviser on a continual basis there for your present financial goals and future aspirations**

"Vision was founded out of the desire to put our clients at the centre of everything we do"

Independence for you

The unique benefits of Vision?

A company committed to independence

One of Vision's best attributes is the fact that we are committed to being totally independent which gives you the ideal environment to receive the best service when it comes to financial planning, helping you achieve and protect the lifestyle you have in mind. We work with you to focus on all aspects of wealth management, lending requirements, protection needs and specialist financial planning advice for your future.

Vision is a progressive and forward thinking company which means that in these new economic and regulatory times we are ardent in providing you with the confidence and support you need for financial planning peace of mind.

Our business is built upon the evolving relationship we have with our clients and these are some of the benefits you can expect from Vision as part of the service:

- A committed independent financial adviser who works with you to offer transparent and tailored advice with direct access when and how you need it
- A dynamic, passionate and growing company with a nationwide team of financial advisers
- We are an award winning business that offers traditional values but forward thinking in a modern industry
- Credibility as an established respected company driven by professionalism
- A two year rolling average of 97% overall client satisfaction and 90% of our clients would recommend us
- Choice of the level of service you would like from us by taking the time to understand you and your individual needs
- Our ethics are to work with highly trusted and professional associates
- A strong administration support team based in our head office
- And our aim is to be big enough to matter yet still small enough to care for each and every client

“Exceptional! By far the best service given by any financially driven business. Second to none”

“Advice I can trust!”

Vision | INDEPENDENT FINANCIAL PLANNING

Our Services to You

People's finances are becoming more complex and the financial landscape is also changing. It is becoming more apparent that independent financial advice is essential in guiding you to help you make the right informed choices for you and your family.

We deliver a personal tailored service backed up with traditional values whilst at the same time being a contemporary and motivated company in tune with today's world. As a Vision client you can expect a range of services which are focused on your long term financial security. Most importantly we take the time to clarify and assess your financial goals and concerns where we can then work with you to create plans to protect your wealth and lifestyle, manage your tax position and help fulfil your everyday financial needs.

Our experienced team of independent financial advisers can help with a comprehensive list of services including the following:

- Discretionary Portfolio Management
- Bespoke Investment Advice
- Pension & Retirement Planning
- Inheritance Tax Planning*
- Mortgages*
- Commercial Finance*
- Private Individual & Commercial Protection
- Trustee & Charity Investment Management
- Power of Attorney & Court of Protection Investment Management
- Specialist Financial Services to Medical Professionals

* The FCA do not regulate Inheritance Tax Planning and certain forms of Mortgage & Commercial Finance.

"Our financial advisor was exactly who we were looking for. He was very supportive and we felt at ease with him. We would highly recommend him, he knew exactly what we needed"

Trust

Our Commitment to You



We are a people's business and so we never lose sight of the fact that it is our clients who help to shape our company and make it the success it is today. That is why we continually strive to ensure that our clients receive a market leading service when it comes to independent financial planning that they can really see the benefits of.

From the outset you will notice what an individual financial advice offering you can expect from us. Our business revolves around our clients and so you will find that importantly we take the time in the beginning to discuss with you your financial aspirations now and for the later years. Vision is structured to enable our advisers to spend more time with clients thus providing you with an unparalleled relationship based financial planning service together with a personalised approach and professional skills in the industry.

Vision is authorised and regulated by the Financial Conduct Authority (FCA) and aims to treat every client fairly and honestly in accordance with the FCA Treating Customers Fairly guidelines.

"The service provided was effectively and efficiently delivered and at all times I felt that I was dealing with a competent professional which is essential for providing confidence when dealing with financial matters"



The Next Step

Hopefully the information given to you here has set the scene for who we are and how we can help you with our independent financial advice service. Our website is also a good source of further information about us and streams through current news updates and articles from the team, as well as existing client testimonials of their experience with Vision.

www.visionifp.co.uk

If the idea of such a service appeals to you, please contact your local Vision adviser to learn more. We look forward to hearing from you.



"It was nice to talk to an adviser in my home over a cup of tea. I felt that they really got to know me and where I wanted to go without any pressure. I now feel comfortable with my future"

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Vision Independent Financial Planning Ltd is registered in England and Wales registration number: 6650476.

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Vision Independent Financial Planning Ltd is authorised and regulated by the Financial Conduct Authority (FCA).
To verify our status please visit The Financial Services Register. Our FCA number is 487395.

