

# Vision

INDEPENDENT  
FINANCIAL  
PLANNING 

CLEAR VISION.  
BESPOKE ADVICE  
FOR CLIENTS



#### PROFESSIONAL ADVISER AWARDS

**Best Network** – Finalist 2020  
**Highly Commended for Best Network** – 2018



#### Winner

Customer experience/  
Service team of the year  
Presented by



**Winner** – 2019  
**Winner** – 2018  
**Finalist** – 2018  
**Winner** – 2016  
**Finalist** – 2013



#### MONEY MARKETING AWARDS

**Shortlisted** – Best IFA Network  
2012, 2015, 2016 & 2019



#### CORNWALL BUSINESS AWARDS

**Finalist** – Best Customer Service 2019  
**Winner** – Entrepreneur of the Year 2014  
**Silver** – Business Leader 2014  
**Silver** – Most Dynamic Growth 2014



#### BEST BUSINESS AWARDS

**Winner** – Best Customer Focus 2017



#### INVESTMENT LIFE & PENSIONS MONEYFACTS AWARDS 2013

**Finalist** – Investment Adviser of the Year 2014  
**Commended** – Investment Adviser of the Year 2013

# Welcome

Welcome to Vision. May we take this opportunity to say thank you for spending the time to see how our dedicated network of Appointed Representative firms and their Independent Financial Advisers can benefit you in providing a tailored and professional financial advice service to meet your needs.

Vision was formed from strong foundations in our core values which we believe in and a desire to provide a dynamic and highly successful financial advice network.

We would like to share these values with you which should hopefully give you an understanding into our approach and the service you can expect to receive from your Independent Financial 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 Independent Financial Advisers clients and treat them in line with the Treating Customers Fairly principles as laid out by the Financial Conduct Authority FCA
- **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 by our Independent Financial Advisers to clients
- **Independent** – totally committed to an independent financial advice service which means choice and access to every financial solution giving clients a comprehensive and fair analysis of the relevant market

# Independence

## About Vision

Vision Independent Financial Planning Ltd (Vision) is a dynamic and established network whose Head Office is based in Falmouth Cornwall, where the company originally started. Vision's Appointed Representative firms comprising of Independent Financial Advisers (IFAs) use whole of market research with no restraint or commitment to any products or providers, to tailor independent financial advice to individual client needs, providing a range of advice to private and corporate clients, charities and trusts, court of protection clients and professional advisers throughout the UK.

Our Independent Financial Advisers have joined our network because they share in our company philosophy – a passion and determination to provide the most appropriate financial advice and support to clients, backed up with regular contact with our strong administrative team. Many of their 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 satisfaction levels of consistently above 98% 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 IFAs clients at the centre of everything we do."*

# Independence for you

## The unique benefits of Vision?

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### **A company committed to independence**

One of Vision's best attributes is that we and our Independent Financial Advisers are committed to being totally independent which gives you the ideal environment to receive the best advice service when it comes to financial planning, helping you achieve and protect the lifestyle you have in mind. Your Independent Financial Adviser will 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 network, 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 Independent Financial Advisers and you as a client 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 Independent 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 rolling average of 98% and above for client satisfaction and 90% of our Independent Financial Advisers 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 our Independent Financial Advisers clients

*We are very pleased with all aspects of help we have received from our Financial Adviser. As my wife said "Our financial future looks clear with Vision!"*

# Vision

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## *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 make the right informed choices for you and your family. Our Independent Financial Advisers will deliver a personal and tailored service, backed up with traditional values, whilst at the same time, being part of a contemporary and motivated support network in tune with today's world. As a client you can expect a range of services which are focused on your long-term financial security. Most importantly, our Independent Financial Advisers will take the time to clarify and assess your financial goals and concerns and will 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 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

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

*"The information and help I received from my adviser was excellent, I felt that he went above and beyond to help and support me through the process. Very happy!"*

# Trust

## Our Commitment to You

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We are a people's business and so as a network we never lose sight of the fact that it is our Independent Financial Advisers and you as a client who help to shape our company and make it the success it is today. That is why we continually strive to ensure you benefit from and receive a market leading service when it comes to independent financial planning. From the outset, you will see what an individual financial advice offering you can expect from our Independent Financial Advisers. Our business revolves around you and so you will find that, importantly, our Independent Financial Advisers 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 Independent Financial Advisers to spend more time with you 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.

*"My adviser spent considerable time and effort explaining everything to me. I trust him implicitly and have already recommended him to my friends and family."*



# The Next Step

Hopefully the information given to you 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, our Independent Financial Advisers and includes existing client testimonials based on their experience with Vision.

[www.visionifp.co.uk](http://www.visionifp.co.uk)

If the idea of such a service appeals to you, please contact one of our Independent Financial Advisers to learn more.



*“Really happy with the recommendations and service provided by the adviser and Vision in general.”*

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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.

