



Joining Wren Sterling

Welcome3

Our values4

What our clients say5

Our story6

How we reach our clients7

What is it like working with us?8

What our employees say9

Our benefits and rewards.....10

Join us.....11

How Wren Sterling makes a difference12

Career paths13



Welcome to Wren Sterling

I'm delighted that you're considering joining Wren Sterling. I'm certain that once you've read this brochure and met us in person that you'll feel Wren Sterling offers the opportunity you've been looking for to advance your career.

In my view, there's never been a better time to have a career in financial advice. Driven primarily by pensions freedom legislation, there is more of a need for our service than ever before. Nearly a million people from the 'baby boomer' generation will require pension advice in the next 15 years on how to manage around £199bn of assets. At the same time there's a decreasing number of firms able to meet this need.

Wren Sterling is a nationwide firm with many established routes to market and we're investing in our ability to serve more clients and help them make the right financial decisions. We're growing year on year and developing talent from within to bring through the next generation of advisers, support teams and central services.

As trusted advisers, it's vital that everyone who works for us cares about the quality of our service and advice. The financial services industry demands complete commitment to client satisfaction and ensuring they receive the right advice, so every aspect of our business is focused on achieving this.

We recognise that the key to achieving our ambitions as a business is our people. That's why we're committed to ensuring everyone who joins us has the opportunity to develop as a professional, whichever career path they choose to go down with us.

Thousands of people across the UK gain clarity over their future financial direction through Wren Sterling. By joining us now, you have the chance to be part of that and make a tangible difference to thousands more in the future.



9

UK locations

250+

employees

90+

advisers

£6.5BN

AUM (correct at
April 2023)

EBITDA

growing year on
year

10

UK building
society
partnerships

A handwritten signature in black ink that reads 'James Twining'.

James Twining
Chief Executive Officer
Wren Sterling



Our values

Our values are at the heart of everything we do, how we deliver our service to clients, and how we expect our colleagues to work and interact with each other.



Cares

Wren Sterling cares for its clients, colleagues and the communities in which they work.

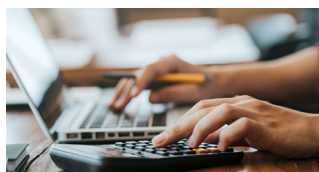
We work with integrity and discipline to do what's right.



Knows

Wren Sterling knows how to solve its clients' most complex problems.

We celebrate knowledge and ensure all our clients benefit from our deep expertise and insight, all of the time.



Acts

Wren Sterling acts to think fast, move swiftly and decisively.

We have the entrepreneurial drive to empower our people. modernise our business and deliver better solutions for clients.



Delivers

Wren Sterling delivers on the promises it makes to its clients and to each other.

We expect to be judged and rewarded based on our reliability and our results.



What our clients say

“Excellent service, honest and frank conversation about my finances that enabled me to make immediate changes to my retirement planning during the initial consultation.”

[Cameron, on reviews.com](#)

“I came across Wren Sterling earlier this year when looking for some financial advice. The advice they gave me was clear and concise.

They made my current situation and my options for the future easy for me to understand and having spoken to them I felt in a much better position and more in control of my situation now and in the future.”

[Jeanette, on reviews.com](#)

FT ADVISER

TOP 100
FINANCIAL ADVISERS

MEMBER 2022
Wren Sterling



4.6 / 5 from 160 reviews
Correct as of March 2023

 **REVIEWS.io**

Our story

2016

Wren Sterling adopts Intelligent Office
as primary back office system

Ian Halley joins Wren Sterling as Chief
Executive Officer

2018

First IFA acquisition completed

Apprenticeships scheme launched

2020

Two further IFA acquisitions

Charity partners nominated by
employees for each office

Launch of WS Awards, recognising and
celebrating employee contributions

2022

James Twining joins Wren Sterling as
Chief Executive Officer

Two further acquisitions, including
Mutual Financial Management LLP

Launch of Employee Benefits Trust

Oxford and Manchester offices open

2015

Towergate Financial acquired by Palatine
Private Equity and Wren Sterling is created

2017

Career paths launched

Wren Says Engagement survey launched

2019

Nottingham office relocates
to Derby Road site

Received Pension Transfer
Gold Standard status

2021

Wren Sterling completes a management
buyout with Lightyear Capital LLC

Four further IFA acquisitions





How we reach our clients

Wren Sterling's principal service is independent financial advice. This translates as providing individuals, companies, employees, trusts, charities and company directors with financial advice that is completely impartial. In our market some advisers can be tied to a particular provider so they can only recommend investments, protection etc from the provider they are tied to. We offer a much wider range because we believe it's in the client's best interests to have more choice.

We operate a channel structure. This means we organise ourselves through three main channels according to the client needs we're servicing.

Private client

This is face to face financial advice delivered in the field, typically in our offices or in clients' homes or workplaces.

Partnerships

We work with ten UK building societies and one retail bank to provide advice in-branch to their members and customers.

Corporate

We offer employee benefits consultancy to hundreds of companies large and small across the UK.

What is it like working with us?

Our people are our biggest asset and we want to make sure you're given access to the widest range of support, training and benefits to complement your salary and match your lifestyle.

Our culture

When we ask 'What's the best thing about working for Wren Sterling?' the answer is our people. We foster a culture of collaboration and support to create an environment where we can excel together.

Recognising hard work

We understand that it can be challenging to work and gain qualifications at the same time. That's why we financially reward those employees that invest time and energy in their own development

Software and systems

Technology is the key to translating the often complex financial needs of our clients into a simple, easily understandable plan that meets their objectives. We support all colleagues in using risk profiling, investment reporting and cash modelling tools to provide timely expert advice to clients.

Opportunities to grow

We are proud to be a Developer Organisation that supports its employees to gain the qualifications and experience they need to develop a career in financial planning.

Local teams

Wren Sterling advisers have local, dedicated admin and paraplanning support. This helps teams to build a rapport, and creates a better experience for our clients.

Taking care of our clients together

Our internal compliance team manages risk to promote good outcomes for clients. We operate a system where advisers receive regular feedback to support continuous professional development and meet quality standards. We also partner with 360, who offer us compliance strategy and technical support.



What our employees say

“I completed a Science degree in 2007 and started my career as an IFA Administrator and progressed through a variety roles. Currently I contribute to the development, implementation, and monitoring of operational strategies to optimise the client experience and drive business profits.

I enjoy the managing of day-to-day activities, analyzing statistics and reading and writing reports. I have recently completed my Lean Six Sigma Green Belt and look forward to applying this to my role and helping the business.”

Charlotte Liley, Head of Central Operations

“Wren Sterling has invested in me attaining Fellowship and as an all-round Adviser. I'm left to run my work like my own business and the management team are there as a support not hinder.

When I have any queries or concerns I can easily engage with the relevant people and will get instant support. The Adviser Package is fair, and working within Partnerships I have more than enough leads to keep me going.”

Rita Verma, Chartered Financial Planner,
Partnerships team

Our benefits and rewards

We're all different, with different needs and families that depend on us, so our benefits have been designed with this in mind.

Benefits that work for you

Every year you can personalise your choices to reflect changes in your circumstances, whether that's protecting you and your family, increasing your savings or enhancing your lifestyle by saving money on shopping.

Awards and recognition

Our 'Wren Sterling awards' recognise exceptional performance and behaviours from colleagues who have gone above and beyond to contribute to the success of the business.

Keeping your health in mind

Everyone has access to our Employee Assistance Programme provided by Aviva, there's a digital GP app and we've trained our Operations and Sales Managers to be Mental Health First Aiders.

You said, we did

We regularly survey our employees to understand the employee experience. A group of representatives across the business, then work with the ExCo Team to agree actions to address the results, supporting the shaping of the future at Wren Sterling. We then provide regular updates on our progress!

Working flexibly

We know working remotely can support a good work/life balance. Our Agile Working Policy allows people to take control of their schedule.

Employee Benefit Trust

We want our employees to benefit from the contribution they make to the success of the business. We've established a Discretionary Trust that ensures that employees receive a share of profits made at each reinvestment point.



Your employee benefits

Generous Holiday Allowance (and Holiday Trading)

Group Life Assurance

Group Income Protection

Critical Illness Cover

Private Medical Insurance (Bupa)

Health Screening

Cycle to Work scheme

High Street Discounts

Electric Car Leasing

Dental and Cash Plan Cover





Join us

At Wren Sterling, we want to help you achieve and succeed. If you hold great customer outcomes close to your heart, then we want to hear from you. We value people from diverse backgrounds with different experiences and are proud to position ourselves as a 'Developer' Organisation.

At the start of your career?

No problem, let us support you through the qualifications you need.

Qualified, but no experience?

Not an issue, we have expertise here to help you apply your knowledge to the real-world situations.

At the top of your game?

Great, come and join an amazing team and reap the benefits of contributing to a growing financial advice company.

You don't need to tick all our boxes

As long as you have a passion for helping and supporting customers with their needs and support them in meeting their financial objectives.

Our diverse team of people work in a number of locations across the UK, including at home, in the office and within local building societies. We have the flexible approach that allows you to enjoy that all important work life balance while looking after our clients.

Get in touch

If you meet the minimum criteria we would love to receive an application from you. Please submit your application by filling in the short form and attach your CV.

Alternatively, feel free to drop an email to hrenquiries@wrensterling.com or contact our Talent & Development Manager Jen Sargent via email at Jennifer.Sargent@wrensterling.com if you need a different way of applying.

How Wren Sterling makes a difference

Training and development

WS has development at the heart of its culture, empowering shareholders, employees and customers to invest in their future. Our dedicated Talent & Development manager supports professional development of our employees through a wide range of solutions.

Corporate social responsibility (CSR)

CSR has come to mean many things in corporate life, but to us it means making an impact to the community both locally and nationally. This is why we take part in fundraising activities during the year and choose local and national charities to donate the proceeds too.

The environment

We are always looking for new ways we can reduce our carbon footprint and be a more sustainable business. This is why we have chosen to offer our clients different ways of connecting with us, rather than traveling to central locations. We now use DocuSign to securely request electronic signatures, saving paper and time.

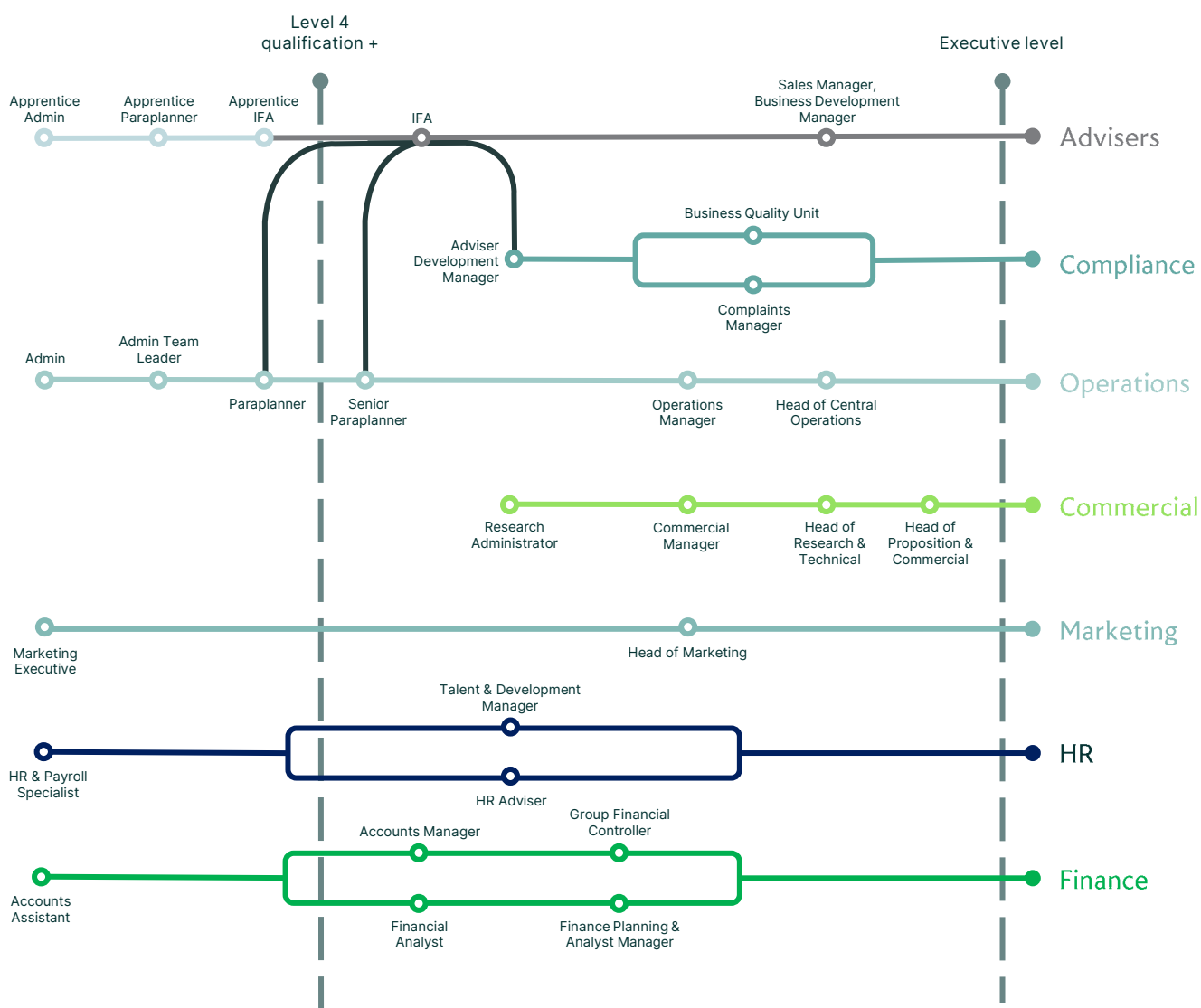
We recognise the success of hybrid working and the impact it has on the environment by reducing travel, which is why we promote hybrid working where possible.



Career paths

We will invest in you to support you in gaining the qualifications, skills and experience you need to take the next step in your career. Take that next step with us.

We want to ensure we're making the most effective use of our talent across the organisation. There will be opportunities to work collectively with, shadow, or grow with different teams. Our Career Path Map illustrates how your skills and experience can lead you to enjoy a varied and fulfilling career at Wren Sterling.



Our HR team

E: HRenquiries@wrensterling.com

W: wrensterling.com/careers



Cecilia Brice
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