# Build your career with us

WREN STERLING

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# Wren Sterling in numbers

- National IFA with 8 UK Regional Offices and around 90 advisers
- Formed in March 2015 following buy-out from Towergate Insurance
- Multi-million pound investments made by owners since inception
- Experienced senior leadership team
- Circa £3bn Assets Under Advice
- Clear channel structure (Private Client, Corporate, Partnerships, Retirement advice) based on client needs
- Over 180 employees

# 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.

Ian Halley
Chief Executive Officer
Wren Sterling

# About Wren Sterling

Wren Sterling's principle 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 five main channels according to the client needs we're servicing.

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| **Private client** | This is face to face financial advice delivered in the field, typically in our offices or in clients' home or workplace. |
| **Partnerships** | We work with eleven 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. |
| **Connect** | A telephone-based advice service offered from our Nottingham office, typically for clients who do not require face to face advice or who want less frequent contact. |
| **Retirement advice partnerships** | We're contracted by some of the UK's largest businesses to offer financial advice to employees at or approaching retirement to help them make the right financial decisions. |

# Our departments

**People join Wren Sterling in a given role, but we like to offer career paths that span across departments to ensure we're developing our talent and making the most effective use of our talent across the organisation.**

### Advisers

Our advisers are all diploma level qualified financial advisers. We've got field-based advisers and telephone-based advisers (in Nottingham only) all focused on guiding their clients' financial decisions. We welcome experienced advisers as well as administrators and paraplanners looking to progress through to adviser level.

### Operations

Our operations teams are comprised of management, paraplanners (or researchers) and administrators. They're based around the UK with our central operations team based in our Nottingham head office. They provide essential support to our advisers, allowing them to spend more time in front of our clients delivering the advice they need to make future plans.

### Finance

Our Nottingham-based finance department keeps the business ticking over by managing our cashflow, paying suppliers, arranging payroll and delivering the management information our leadership team requires to make the right decisions for the business.

### HR

Our HR team is responsible for the recruitment and development of talent in Wren Sterling. It also coordinates employee benefits and other rewards and plays a key role in our corporate social responsibility programme, ensuring Wren Sterling makes a positive difference to local communities.

### Commercial & Marketing

The commercial team is responsible for our business development, lead generation and the development of our proposition, or, the services we offer to our clients.

Our marketing team is responsible for brand, sales literature, internal and external communications, and our online presence (website, social media).

### Compliance

Compliance is essential in financial services. Our compliance team work hard to help train our advisers and support teams, check advice, and keep the business safe. Our compliance team consists of ex-advisers, our compliance partner, Bankhall, and experienced compliance professionals.

# Your benefits

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

We're all different. People have lives outside of work, families that depend on us, so our benefits have been designed to accommodate your individuality.

Your allowance is typically five per cent of your salary as 'flexible benefits' and Wren Sterling also pays contributions to your workplace pension, as per auto enrolment.

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.

On top of your pension savings, our benefits include:

- Holiday Trading
- Childcare Vouchers
- Cycle to Work Scheme
- Discount Shopping
- Employee Assistance Programme
- Optical (Eye Test) Vouchers
- Season Ticket Loan Group Life Assurance
- Group Income Protection
- Critical Illness Cover
- Partner's Life Assurance
- Dental Insurance
- Cash Plan
- Healthscreening

# How Wren Sterling makes a difference

**Training and development**

First and foremost, we want to make sure people who join Wren Sterling know they can have a career with us, not just a job. We want to make a positive difference to the career of everyone who works for us, whether that's on the job training, professional qualifications including adviser examinations, or a structured career path for people looking to progress to management positions.

**Corporate social responsibility (CSR)**

CSR has come to mean many things in corporate life, but to us it means being aware of our community and making an effort to support it. We choose local charities and take part in fundraising activities throughout the year to support them.

We also give our employees a day off each year to devote to volunteering.

**The environment**

Wren Sterling has implemented a digital client experience and we're constantly looking to reduce the amount of paper we use in our administration, marketing and client communication, while the offices we've chosen to move to in recent years have been chosen for their green credentials. We recognise that many of our employees and clients believe strongly in environmentally friendly business and it's something we're passionate about and always looking to improve.

## What our clients say

"I was put at ease about my financial requests... which made me feel valued which for me was extremely important. I hope Colin is made aware of my comments as his advice and guidance has certainly made a difference to my life."

Mrs J Kenyon

"Ed has sorted out my pension with the best options and made it work to my advantage, whereas if it had been left where it was it would have been of no benefit to me at all. He is available to talk to whenever we need and if he is with a client he always calls back the same day. The explanations he gives are clear and concise and I would recommend Ed Stewart to any of my friends."

Mrs S Coton

# Our values

Our values are the foundations of our business. They dictate how we do business, how we approach our clients, partners and colleagues and the way we deliver financial advice.

### Uncompromised

Uncompromised sums up the way we work and our dedication to getting the very best outcomes for our clients. Our advice is independent, so nothing comes between us and recommending the right mix of products for our clients to meet their financial goals.

### Approachable

Regular contact benefits everybody. It builds our clients' financial knowledge and deepens our understanding of their personal circumstances, because the better our understanding, the more precise our advice will be.

### Clarity

We make sure our clients are clear on their financial situation, so they feel in control. We communicate using plain English and take our time to explain our recommendations with clarity.

### Genuine

We know open and honest dialogue is crucial to successful client / adviser relationships, so we'll always talk frankly with our clients about their financial goals.