wingate
FINANCIAL PLANNING
2012 - A celebration of Wingate's successes
wingate
BENEFIT SOLUTIONS

Awards

We have once again been recognised for our approach to client service and advice with a number of awards during 2012. We were shortlisted for Greater London 'New Model Adviser' of the Year (Citywire), Small IFA of the Year (Financial Times FTAdviser) and won the Best Tax and Estate Planner (Moneyfacts). The highlight of the year was winning the Gold Standard for Financial Advice for the second consecutive year, and we were delighted with the judges' feedback:

> "There is a real integrity in the way this company does business. It starts from the base of 'what's best for clients?' and everything else follows from there. It exemplifies how a small company can deliver a high quality of service to its client base by focusing on their needs. The processes throughout the company are clear, its proposition to clients is clear, and the on-going commitment to staff training is very impressive.
>
> Wingate offers simple, value for money advice that does not compromise the client. An excellent company. This company is strong in all areas of its business and is a worthy recipient of a Gold Standard"
>
> Lawrence Gosling – Chair of the Gold Standards Judging Panel

Francis Townsend & Hayward

In July, Francis Townsend & Hayward (FTH) joined forces with Wingate Benefit Solutions and Wingate Financial Planning to create one of the largest independent and privately owned Financial Planning and Employee Benefit firms in Surrey and South London.

The firms share a common and long established history. FTH were formed in 1959 – one of the longest standing firms in the country.

Growth and Sustainability

Despite the general economic challenges, we are delighted to have achieved double digit organic growth over the past twelve months. Importantly, when most national financial advisory practices continue to lose money, we've been consistently profitable which creates long term sustainability and allows continued investment in our business for the benefit of our clients. The Wingate group of companies is now one of the largest independently owned firms in Surrey, and employs 30 people.

Strategic Partners

Wingate has forged stronger bonds with professional accountancy, legal and tax firms in 2012 and we look forward to working with them further in 2013. These partnerships enable us to deliver a joined up view on advice and provides clients with access to this type of expertise if they do not have existing relationships.

Employee Benefit Service Proposition

Our market-leading pension governance service was developed to meet the requirements of the Pensions Regulator and we're delighted to announce this has been instrumental in our shortlisting for the 'Corporate Adviser of the Year 2013'.

Auto Enrolment into Pension Schemes

The new pensions legislation which requires employers to automatically enrol employees in to a pension scheme has already come in to force for the largest UK employers and will apply to all UK employers during the next 4 years.

Throughout 2012 we've held planning meetings with all the major providers of Workplace Pensions, including life assurance companies, as well as government sponsored schemes, such as NEST.

Our expertise includes detailed analysis of all the options available to the employer and their associate costs. We report the analysis and conclusions which are specific to each business. The data is designed to support short, medium and long term business planning from both an operational and financial perspective.

The review of 'retail' financial services

The most substantial changes to our profession for two decades comes in to force at the end of 2012, and whilst many of our peers seem woefully unprepared, we are delighted to confirm:

- All our advisers have current 'Statements of Professional Standing' and meet or exceed the new qualification benchmarks
- We offer comprehensive service propositions to our corporate and private clients which can be tailored to meet their specific needs. These are available with clear, transparent and competitive fees.
- We will continue to offer private clients with fully Independent advice

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Wingate Financial Planning is a trading name of Wingate Wealth Management Limited
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