

Our fourth gold standard in independent financial advice award



For the fourth consecutive year we are delighted to announce that members of Wingate's Financial Planning team were invited to the house of commons last night to receive the prestigious Gold Standard in Independent Financial Advice.

The Gold Standard award seeks to assess excellence in five key areas.

Wingate Financial Planning shows a keen understanding of the need to evolve and modify structures accordingly and, more importantly, has a clear view of how change should benefit clients. The selective buying in of expertise complements a well honed financial planning service. Pathways for advisers to follow demonstrate a commitment to get to know their clients well in order to offer the best possible financial planning service.

Deborah Benn, Chair of the Judging Panel

To achieve a Gold Standard Award, companies have to complete a rigorous questionnaire designed to assess progress in five pillars – financial strength, capability, service, fair value and trust. Entries are assessed by an independent panel of judges. Only those companies demonstrating that they are going above and beyond standard procedures in order to meet the high levels of excellence set are in a position to be considered for the award.

In 2008 we became one of the first Chartered Financial Planning firms in the country, and we now feel it is increasingly important to exceed the already strict requirements imposed by ongoing changes to our profession. Only a very small minority of firms are successful in winning this award, and we attribute our success to our excellent customer focussed team.

Ben Clarke, Managing Director, Wingate Financial Planning