

2011 Awards
A celebration of Wingate's success

Record-breaking achievements

2011 was a record-breaking year for both sides of Wingate's business. We achieved a place in six professional awards, attained the highly acclaimed 'Silver' standard in Investors in People and maintained our ISO9001 accreditation whilst growing the business over the past twelve months.

One of the first Chartered firms to receive the accolade in 2008, Wingate Financial Planning retained its Chartered Financial Planner status into a fourth year. The firm also picked up the prestigious Gold Standard for Independent Financial Advice in November from the House of Lords. One of only nine firms nationally to be presented with the award, the judges said of Wingate:

This was a very strong submission with an excellent client focus. A great deal of client care is evidenced and commitment to delivering value for money. Judges were impressed with qualifications and liked their service policy. The client journey is well documented and detailed analysis provided.



The Wingate Financial Planning Team at the Houses of Parliament for the Gold Award

This exceptional peer recognition places Wingate as one of the most awarded firms nationally in 2011, and a leader in Employee Benefit Consultancy and Private Client Financial Planning.

Winning awards gives further credibility and validation to our core aim; for the Wingate companies to be at the forefront of professional Financial Services companies. We extend our thanks to our clients and our dedicated and professional team for supporting us in winning these accolades

Ben Clarke, Managing Director

An innovative approach to employer governance of pensions

At the start of 2011 we launched a market-leading service for employers to support them in delivering best practice in the management and due diligence of their company pension schemes. This service focuses on six core principles, and not only protects employers but also supports them in providing a valuable, visible and well maintained pension benefit for their employees.

We have provided consultancy to firms who are wishing to demonstrate commitment to their employees by maintaining a competitive edge on their benefit proposition. This has included the introduction of more choice for employees on their benefits and independent recognition of the value the companies pension scheme provides with the Pension Quality Mark.

Helping employers manage through difficult economic conditions

We do however recognise many employers are seeking to reduce costs and Wingate have provided extensive consultancy on how benefits can be retained, at lower cost, whilst improving the value these provide employees. This has been achieved by adopting an innovative approach and utilising our extensive experience across many industry sectors, allowing us to offer cost effective solutions which we know are positively received by employees.

Everything we do is focused on achieving the best possible outcome for the employer given their objectives and corporate goals. We embrace the challenge of meeting cost containment objectives with the same vigour and enthusiasm as we demonstrate when we are helping organisations reshape and enhance their benefits. This commitment is supported by our transparent fee based remuneration structure which ensures there is no conflict between us negotiating the best possible outcome for our clients and the level of our income.

Paul Weeks, Corporate Director

Press coverage

Wingate's opinion is often valued by the press, both local, national and within our profession. Wingate received more mentions in 2011 than ever before, and was asked to be the "Cover Star" of the New Model Adviser magazine in November. This publication, which is aimed at our profession, seeks to showcase the pinnacle of Independent Financial Advisers and Chartered Financial Planners.



A proportion of the Wingate team as featured on New Model Adviser's "Cover Star"

Supporting executives and business owners

In 2011, Wingate had great success with winning new high-value clients who appreciate our unbiased, simplified approach to Financial Planning. Increasingly, frustrated by the banks, who are motivated by the manufacture and sale of their own products our client focused service has allowed us to compete and attract clients who may have been attracted to services from the Private Banks, in particular.

On more than one occasion this year Wingate has been described as "client-centric", and for us there is no greater compliment. We take great pride in the fact that our clients, and their families, are the motivator for all we do.

Alistair Cunningham, Financial Planning Director

Final words and looking ahead to 2012

We have great plans to expand on our successes of 2011 in 2012, and look forward to sharing them with you.

We'd like to thank all our clients, whether corporate or private for supporting us throughout 2011, and in many cases for many years. We appreciate the opportunity to continue to support your business and personal affairs in the future, and wish you a healthy and prosperous 2012.

Ben Clarke, Managing Director





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