

Why 1825 transcript

Shona Lowe – Head of Private Client Services

- 'It is absolutely critical to get financial planning and now is a really good opportunity to do that. We understand that people's lives are really busy; people's lives are really complicated, but we also know that there is a huge number of opportunities at the moment to maximise what people are working hard for. But the problem is that a financial plan doesn't build itself.'

Benjamin Fabi – Paraplanner

- 'The financial world that consists of all sorts of things that can trip up a DIY investor, it is a totally different place to what it was to five or even ten years ago.'

Ian Howe – Managing Director, London

- 'Fundamentally, working with a financial planner we are able to change the relationship you have with your money, making sure you have a plan, a trajectory.'

Stephen Munro – Chairman

- 'We actually focus on you, as a client. And all the key things, the valuable areas that are most attractive to clients and simply not talk about assets, money – we want to make it real for you and give you better options and choice as you go.'

Shona Lowe

- 'So what we are trying to do is to ensure that the financial planning our clients benefit from is as broad as it possibly can be, so it making sure we are looking at the client's needs beyond their investments. We're actually looking at very detailed into their family circumstances; we're looking at their broader asset base to understand what we need to do to make sure their financial plan covers all of those aspects.'

Ian Howe

- 'The profession of financial planning is so incredibly important and valuable for those that experience financial planning; it is really truly life changing.'

Shona Lowe

- 'We need to be able to make sure that financial planning is something that people feel comfortable getting and are pleased and gives them a complete piece of mind once they have'

Stephen Munro

- 'I think we can help you as an individual and all our clients. I think we've got a team of people, I think we've got a lot of people, a lot of money being invested in our team and I think we can do a good job for you and all the different people we connect to.'

Benjamin Fabi

- 'The next generation of clients are going to be far more switched on to the financial planning model and the way it operates, and 1825, I think is right at the front of making that part of our industry wider and more accessible.'

Michelle Douglas – Client Support Services

- 'What makes 1825 different is that we truly believe in investing in our people. Everybody within our organisation truly believes in doing what is right for you, the client.'

Stephen Munro

- 'I think 1825's focus on the client, rather than simple wealth management is a big differential in the market. I believe that the resources are going purely on making sure that your personal finances are geared properly to give you more options and a better life.'

Ian Howe

- 'What we are delivering is what we say we do, so, we are financial planners so we will work with you, to understand you and understand what it is that you want to achieve with your life and the life of your family. And then we organise your finances in such a way to give you, to show you the peace of mind that you can live that future chosen life. We think that is incredibly different and incredibly powerful'