



Recruiting exceptional Partners

Foster Denovo



Be at the heart of a leading financial adviser firm

About Foster Denovo

Founded in 2005, we are an award-winning, leading UK firm of financial advisers. We are experts in our industry, providing bespoke financial advice to individuals and their families, charities and employers.

Our business is built on relationships and trust. We have an open, mutually supportive, knowledge sharing culture, which enables us to think differently for the benefit of our clients.

Our people, along with our clients are at the heart of our business. Delivering an outstanding client experience is one of our guiding values.

If you want to be part of the continued growth and innovation of our leading firm of financial advisers, we want to hear from you. Whether you join us as a Partner, employee benefits adviser, client experience executive or any other role within our support team, you'll be joining a nurturing and dynamic place to work.

9 offices throughout the UK.



50 accolades recognising our work, winning 30 awards.



+65  our Net Promoter Score (NPS) and the value our clients place on us.

we work with thousands of clients from; individuals, families, employers and charities.



1 of the top firms of financial advisers in the UK.



Master brand



Sub brand
Individuals



Part of the Foster Denovo Group



Part of the Foster Denovo Group



Part of the Foster Denovo Group

Employees



Part of the Foster Denovo Group



Businesses



Part of the Foster Denovo Group

Our Private Client Partners offer a full financial planning service to individuals based on a thorough understanding of their circumstances. This is provided using either a Quantum or Select service. Our Quantum service is a full financial planning service where Partners aim to establish long-term relationships with their clients, providing ongoing advice and financial coaching. Our Select service is for clients who are looking for financial advice which is focused on just one or two areas.



Part of the Foster Denovo Group

Our Private Wealth Partners provide financial planning advice for high net worth individuals that have more complex financial requirements. They work with their clients to manage and preserve their established wealth, helping to ensure they are able to pass it on to their family in the most tax efficient way.



Part of the Foster Denovo Group

Our Mortgage and Protect Partners focus on providing an excellent experience and recommendation to those clients who are only looking for mortgage and/or protection advice. They can help all types of mortgage clients and give tailored advice to provide the best solution for their needs and circumstances.



Foster Denovo General Insurance Services (FDGIS) provides access to comprehensive personal insurance services; highly tailored for individuals and their families. By offering expert advice and guidance, FDGIS will find the policy that offers clients excellent value for their requirements.



Part of the Foster Denovo Group

Secondsight is Foster Denovo's multi-award winning employee benefits, wellbeing and financial education specialist. Secondsight aims to create financial certainty for its clients' employees through the delivery of an outstanding employee benefits experience, resulting in improved employee engagement and enhanced employer return on investment. The team works with more than 275 corporate and charity clients.

Investment Proposition

Our investment advice includes the Dynamic Portfolios and the Clearview platform. The Dynamic Portfolios are investment portfolios that have been carefully designed to balance investment risk with returns to achieve our clients' financial goals. These include funds from Sequel Investments Limited, which are Foster Denovo's range of investment funds. The Clearview platform is an online portal that allows our Partners to access to a variety of investment products and view clients' investments online and all in one place.

Who we are looking for

To continue our growth aspirations, we are looking for bright, talented, and like-minded advisers, who we refer to as Partners, to join our team. We want the people who join us to care about what they do, to exceed our clients' expectations whilst maintaining our brand and reputation at all times. We also have a core set of guiding values that help to underpin our business and our people.



Fair



Opportunity



Skilful



Trust



Empowered



Relationship

Our company values are an integral part of how we operate, they are ingrained in the way we work and have led to Foster Denovo being accredited with Investors in People Gold standard. This recognises that we have demonstrated a continuous commitment to making sure our people are at the heart of all that we do.

Reward and recognition

We value every single person who works with us. As a Partner at Foster Denovo you will be working with and have the support of our teams, whilst you play an integral part in helping us maintain being one of the UKs leading firms of financial advisers.

We recognise the value, dedication and hard work of our Partners, which is why we run our annual Partner Performance Programme. The programme rewards Partners with fees rebated for practice growth, new business and high standards of business quality.

As well as the recognition programme, Partners have support from a dedicated business lead and a monthly dashboard to help them stay on track.

In addition, we run a Partner Recruitment Referral Programme, from which you can earn a revenue bonus for every new Partner you introduce to Foster Denovo.

Training



We are committed to our Partners and helping you to achieve both your personal and business goals. We understand that personal development can play a key role in enhancing skill set, whilst supporting our organisation. This is why our Partners have access to our comprehensive training and mentoring programme, which is split into three distinct areas:

The onboarding process – this allows us to understand the type of business you want to build and the support you would benefit from. It enables us to build a training programme around you and your aspirations.

Growth Academy – this aims to drive your business forward and will give you an opportunity to work with one of our experienced Partners, undertaking training and development whilst getting to know the Foster Denovo culture and team that provides support.

Quantum Leap – this is a mentoring programme run by our most senior and successful Partners. Meeting every quarter, the focus is on helping to develop your individual business and is an excellent opportunity to share ideas and create new ways of working.

Support

Being associated with a well-known, award winning brand means Partners can expect to receive a dedicated support service for themselves and their clients.

This includes:

- paraplanning support;
- admin support;
- marketing support;
- IT support;
- a dedicated business lead's support.



Making a positive difference

Through financial planning, we help clients reach their goals, and as an organisation we have a number of ESG goals in place.

Every year, through our employee engagement group, The Voice, we involve are people in nominating and selecting the charities and good causes we support and throughout the year fundraise, raise awareness, collect donations, support community projects and host company social events.

We believe we have a responsibility to protect the environment and limit our impact where possible. It is a responsibility everyone at Foster Denovo shares.

Self-employment

Nikki's journey

Key facts

NAME Nikki Rowell

CAREER HISTORY

- Worked as a Mortgage Adviser at HSBC in Leeds.
- Became an Independent Financial Partner in 2006.
- After the Retail Distribution Review moved to an accountancy practice and became chartered in 2013.

BIGGEST CAREER CHANGE

- Going self-employed in 2018 was a big change for me; just as big as when I made the move to London from North Yorkshire in 2009. Both have been absolutely worth it.

OUTCOME

“It has been beneficial having other financial advisers around me who are in a similar position.”

“There is such a great range of experience within Foster Denovo.”

“It worked out as the best option.”

“I’m used to being employed full-time so working in an office and amongst a team of people was important to me.

Being a Partner at Foster Denovo meant I would effectively be running my own ‘business’

“Before I made the decision to join Foster Denovo I was able to speak with the CEO Roger Brosch as well as other key people in the business. This helped me realise that being a Partner at Foster Denovo meant I would be effectively running my own ‘business’ which really appealed to me. I had gained a strong understanding of the different approaches to servicing clients from my time at HSBC and I felt equipped to deliver an even higher standard of service to all my clients, whatever their needs were.”

Why self-employment?

“Being able to get the right deal for both myself and my existing clients at Foster Denovo helped me make my decision; it became clear it worked out as the best option. When I actually became self-employed, I was both anxious and excited. I enjoy being a financial adviser, whether self-employed or employed, but I had some reservations.

For example, I was worried about what moving firms would mean for my clients, specifically client ownership. However, when compared to the other options I explored, client ownership is very clear and fair here at Foster Denovo. There are no caveats, my clients belong to me.”

Support at Foster Denovo

“Foster Denovo shared my intents to be patient and respect any restrictions involved in moving over to the company which helped the process go smoothly. This was very helpful and important to me, I really appreciated it. Having other Partners around me was also a huge benefit; there is such a great range of experience within Foster Denovo. Some of the more experienced Partners run very successful operations and are always happy to offer invaluable guidance and support. There are also many other Partners with similar experience to me. This has also been a benefit; some have appreciated my technical expertise and we have worked together, sharing some client work. It really is a great environment to be working in.

Another benefit is having full use of an office and all the facilities that come with it, just as when I was employed full-time. Having the opportunity to be part of a team has also helped to make me feel as though there hasn’t really been much of a change for me.”

Self-employment

Tom's journey

Key facts

NAME Tom Schofield

CAREER HISTORY

- Played professional rugby in the U.K, Australia and LA
- Set up Tempo Teamwear Limited, a sports team wear company
- Became a Financial Advisor at Ablestoke Financial Planning in 2017

BIGGEST CAREER CHANGE

- Changing my mind set from looking to play rugby for the next 10 years to moving away from the sport and doing something else.

OUTCOME

“Foster Denovo gives me the confidence to go out and give my clients the best possible advice I can.”

“The excellent support provided by Foster Denovo gives me peace of mind as an advisor.”

“Being around other Partners with a wealth of knowledge certainly benefits my clients.”

Why Foster Denovo?

“I heard about Foster Denovo from someone I previously worked with who is now an adviser within the company. I spoke to Foster Denovo and several other financial advisory firms and networks and to me Foster Denovo just made sense with regards to everything. You look at the pay away, the support, the size of the company, the quality control, making sure you stay on the right side of compliance, which Foster Denovo are very strong on. All of this combined certainly gives me a lot more confidence doing my job than where I was at previously. I was so impressed by Foster Denovo that I even got my dad, who’s also a financial adviser, to join at the same time.”

Support at Foster Denovo

“The support received by Partners at Foster Denovo is really beneficial and was one of my main reasons for joining the company. Having the expertise of paraplanners and the client experience team pulls the whole process together efficiently and lets me to stick to my strengths as an advisor, which is speaking to and helping clients. It allows you to free up your mind mentally meaning I can focus on what I need to for the day or plan for the weeks ahead. I never had this kind of support at my previous company, and once you get used to it and start delegating jobs and responsibilities to other people, it definitely makes my job easier.

Being around other Partners within the company also creates a great support network. Certainly for me having only been in the industry for four years. Talking to others with more, or less, experience allows you to pick up things that you wouldn’t necessarily think of yourself. We all talk about possible solutions for things and that collective knowledge between all the advisers means we’ve pretty much got all bases covered.”

Future plans

“I would like to have my own team of dedicated support staff enabling me to solely focus on my clients. The whole process, from me speaking to a client, the documents prepared for that meeting, the research, the recommendation report, giving and implementing advice, the annual reviews, would all run like clockwork. That is where I want to be from a working standpoint.

In terms of my business, I would like to build up a higher value bank of clients and eventually I would like to bring in a team of advisers to work with me. The end goal is to build the business up to sell or have someone else take charge. But at the minute, I’m certainly motivated to just keep working and building my business and I feel Foster Denovo is the best place to be to be able to do that. ”

Phasing out

Mike's journey

Key facts

NAME Mike Wiggins

CAREER HISTORY

- Started at Prudential Assurance as an Agent in 1989, became a Financial Adviser and then was promoted to Sales Manager in 1992
- Became an Independent Financial Advisor at Kilminster Financial in 1998
- Later that year, launched and became a Partner and Independent Financial Adviser at Wiggins Browning
- Set up Orchard Wealth Cultivation Limited in 2005 with wife Sally as Co-Director and Shareholder

OUTCOME

- After two years of transitioning and settling our clients in to Foster Denovo, I plan to fully step back and retire in the coming year.

“I don't know that we would have found a better fit. We certainly have never regretted choosing Foster Denovo.”

Why Foster Denovo?

“When Sally and I were looking to sell Orchard Wealth, the key difference we saw between Foster Denovo and the other companies that wanted to buy us was that Foster Denovo, and the CEO Roger Brosch, understood how important it was to facilitate the transition. It was so important to us to pass over our 40 clients and to ensure they would continue to receive the service they had been used to. Over the years a lot of our clients have become friends, so we wouldn't have wanted to bank our cheque from Foster Denovo if the move wasn't going to be right for them either. Therefore, as part of the deal, it was crucial to us that we were going to be retained to ensure that the handover went well, and we could introduce the new advisers. I have been at Foster Denovo for two years now and I don't think any other company would have allowed me to stay in the picture as long.”

Transition to Foster Denovo

“The transition, and the way that we transitioned, went well and it was certainly the only way we would have done it. Our two priorities were, obviously we wanted to be rewarded for the work that we've done over the years, but we desperately wanted our 40 clients to find a new adviser that would look after them for a long time. Whenever you move clients from one adviser to another there's bound to be some resistance, but the move went really well as we retained 99% of clients. We also received something like 99.9% of our deal as well, which I think is probably unheard of in the profession.

Foster Denovo was also very flexible when we were initially transitioning the clients. At the end of the first year, there was still a lot of admin work to do, so we were able to have a conversation with Foster Denovo and reach a mutual agreement in terms of contracts. Sally originally had a one-year contract but stayed on for another year on a part time contract. Whereas, I had discussed with Roger that I would do two years full time and then the third year would be negotiable, so I have gone down to two days a week as I take a step backwards. This flexibility allowed us to settle our clients without feeling like we were being rushed.”

Maintaining client relationships

“It's been a gradual transition, not only for the clients, but for the two Partners who are taking over my client base. At Orchard Wealth, we provided lifestyle financial planning, so worked differently to Foster Denovo, therefore it's been quite a learning curve for them. I've introduced a lot of new things but they have enjoyed, and been grateful for the training. In the first year, I introduced them to the clients, and they would observe me running the meetings. As I've taken more of a step back in the second year they have been running the meetings and I was just there as a support. It's been rewarding to mentor these Partners, and they have both expressed the view that they have been able to develop their skills and enhance their service proposition during the time we have spent working together.”



INVESTORS IN PEOPLE®
We invest in people Gold



Interested in joining us

If you are ready to grow your business with the support of an award winning firm, we'd love to hear from you.

Explore the opportunities and vacancies we currently have available here:

<https://www.fosterdenovo.com/work-with-us/i-am-an-adviser/>

Whatever stage your business is at, join us and we'll help you achieve your personal and professional goals in an innovative and supportive environment, allowing us to help as many clients as possible.

If you would like to know more about working at Foster Denovo, or would like to discuss any of our current vacancies, contact our Head of Talent Acquisition, Helena Bogdanovski:

call 020 7469 2800;

email helena.bogdanovski@fosterdenovo.com; or

visit www.fosterdenovo.com

*Calls are charged at your standard landline rate.

Foster Denovo Limited, is authorised and regulated by the Financial Conduct Authority. Registered Office:
Foster Denovo Limited, Ruxley House, 2 Hamm Moor Lane, Addlestone, Surrey, KT15 2SA.
Telephone: 01932 870 720 Email: info@fosterdenovo.com Website: www.fosterdenovo.com