



# Recruiting exceptional Partners

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 was built on relationships and trust. We have a 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.

**65** accolades recognising our work, winning 30 awards.

**+80** our Net Promoter Score (NPS) and the value our clients place on us.

**13** offices throughout the UK.

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

**WE WORK WITH THOUSANDS OF CLIENTS FROM; INDIVIDUALS, FAMILIES, EMPLOYERS, AND CHARITIES.**



# Our brands and services





# Our brand Partners



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.



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.



Second sight is Foster Denovo’s multi-award winning employee benefits, wellbeing and financial education specialist. Second sight 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.



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**



**SKILLFUL**



**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 Platinum 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.

## PARTNER BONUS SCHEME

**Our Partner Performance Programme, or ‘Bonus Scheme’, spans an entire year and allows Partners to earn a fee rebate of a set percentage on all initial revenue exceeding the threshold set for the Partner banding.**

If you are an investment advice Partner, you can also earn an additional fee rebate of a set percentage. 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.



## GOING THE EXTRA MILE FOR YOU

Whether you’re a financial adviser or work in one of our support departments, you’ll have access to an extensive range of employee benefits. Each of these has been carefully selected to provide real value and improve your wellbeing, making our company a better place to work in the process.



## SHARE AND SUCCESS

**In February 2022, Crestline Investors Inc. (‘Crestline’) invested in Foster Denovo and provided the group with funding to enable the next growth phase over the next 5 years (until 2027).**

Our strategy is to grow our profitability over this period to increase the value of shares ahead of a partial or full share sale event.

Following the successful completion of your probationary period, and as part of the Foster Denovo group, you will have the opportunity to purchase shares at a discount. This means you will also be a stakeholder in our business and benefit from the company’s growth whilst working within the business.

## INVESTMENT PROPOSITION

Additionally, once you have completed your probationary period, we offer access to the Dynamic Portfolio and Sustainable Portfolio investment opportunities, and we will include regular reviews and support from within the team.



# Training and support

**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:

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### 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.
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### PARTNER DEVELOPMENT PROGRAMME

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.
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### BUSINESS MENTORSHIP

This is a mentoring programme run by our most senior and successful Partners. Meeting throughout the year, the focus is on helping to develop your individual business and is an excellent opportunity to share ideas and create new ways of working.

**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
- marketing support
- compliance and technical support
- admin support
- IT 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 example 1

## 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.*

”



# Nikki's journey continued...

*"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."



“

*It worked out as  
the best option.*

”



# Self-employment example 2

## 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 adviser.*

”



# Tom's journey continued...

## 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."

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

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## 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."



# Self-employment example 3

## MARNEL'S JOURNEY

### Key facts

NAME: MARNEL STAFFORD

### CAREER HISTORY:

- Started my career in hospitality in South Africa, owning and consulting on several hotel projects alongside running a marketing company for the hospitality sector.
- After a divorce and years of long, demanding hours managing events like conferences and weddings, I realised I needed a change.
- Completed the rest of my financial exams and qualified as a financial adviser in South Africa at the age of 46.
- Moved to the UK to be with my new husband and, despite initial setbacks with qualification recognition, requalified in 2023 to continue my career in financial advice.
- Joined Foster Denovo in 2020 first in administration, and over the following years qualified as a financial adviser.

*“I studied throughout lockdown and requalified in the UK by the end of 2023.”*



“

*It's been a tough but rewarding journey, and my ability to adapt quickly has been a huge asset throughout.*

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# Marnel's journey continued...

## WHY FOSTER DENOVO?

"I chose Foster Denovo because, after years of working for myself, it was refreshing to join a company where I didn't have to handle everything on my own. The structure, support, and resources were already in place—I could just focus on doing the job well.

As I settled into the admin team, I got to know the people and culture, and really valued how approachable and down-to-earth everyone was, including management.

What really stood out to me was the sense of community and support. I could have gone elsewhere, but the people and the internal networking opportunities were key reasons I stayed. Foster Denovo offers the best of both worlds—it's large enough to provide stability and backing, but small enough that you feel seen and valued."

## HOW HAS THE SUPPORT BEEN AT FOSTER DENOVO?

"The support at Foster Denovo has been excellent. When I wasn't sure which direction to take in my career, I had open conversations with Helena who helped me see that becoming a financial adviser was the right path. The guidance is there if you ask for it, and people are always willing to help.

Coming from South Africa, I noticed cultural differences, but I've found people here to be welcoming once you make the first move. I'm naturally direct and love a good conversation, which made it easier to seek help when needed. At Foster Denovo, hard work is recognised, and the more you put in, the more you get back. I've always felt supported by the team here."



## DO YOU HAVE ANY FUTURE PLANS?

"Starting a new career at 51 means I'm focused on building a strong foundation over the next five years, working at pace to establish a solid client base.

One of my biggest passions is mentoring and education—particularly supporting young women to enter the financial advice profession, where there's still a real lack of representation. I'd love to establish a scholarship in the next couple of years to help make that happen.

It's hard work, but I love what I do. If you care about your clients and if you're really passionate, it all comes to you by itself. If that's your focus and not the money, you'll be a happier person. For me, the real reward comes from knowing I'm making a positive impact—both with clients and future advisers."



# Self-employment example 4

## KISHEN'S JOURNEY

### Key facts

**NAME: KISHEN KUMAR**

### CAREER HISTORY:

- Began my career as a stockbroker in London at UK Equity, starting as an intern.
- Progressed to working 'on the floor' within just two years.
- I gained my Investment Advice Diploma from the Chartered Institute for Securities and Investment in 2015 and became Chartered MCSI in 2019.
- I expanded my horizons to offer my clients holistic financial planning in 2019.

### BIGGEST CAREER CHANGE:

- To decide to work for myself and become a financial advisor.

### OUTCOME:

*"There was a lot of uncertainty, and I needed the confidence to go for it and push through."*



“

*I met with a few firms, and Foster Denovo had such a great atmosphere. The people were welcoming and always ready to help.*

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# Kishen's journey continued...

## WHY FOSTER DENOVO?

"When I was exploring options, I met with several firms, but Foster Denovo immediately stood out to me. The atmosphere was genuinely welcoming, and it was clear that the team culture was collaborative and supportive. Everyone I met was open, approachable, and genuinely interested in helping others succeed.

What really sealed the deal for me was the firm's emphasis on flexibility, that they understood the importance of a healthy work-life balance, and the fact that they are truly people-focused.

Clients are at the heart of everything Foster Denovo does, and that matched perfectly with my own values around building lasting, trust-based relationships."

## HOW HAS THE SUPPORT BEEN AT FOSTER DENOVO?

"The support at Foster Denovo has been exceptional, right from day one. Whenever I needed help, whether it was understanding internal processes or navigating client cases, there was always someone ready to help. The support team is incredibly knowledgeable and approachable, which made those early days of transitioning into a new role far less daunting.

On top of that, the advisers themselves are very generous with their time. Even giving me 5-10 minutes to talk through a case or share insights made a huge difference and created a real sense of shared success."

## DO YOU HAVE ANY FUTURE PLANS?

"Looking ahead, my goal is to continue growing and scaling my practice. I want to build a strong, sustainable business that not only supports my clients but also provides opportunities for others to grow within it. This could involve partnering with like-minded advisers or even building a team by employing support staff to help manage my expanding client base.

I'm excited about the future and the possibilities that come with creating something that can really stand the test of time."





# Practice Buy-outs

## PLANNING YOUR FUTURE, PROTECTING YOUR LEGACY

As a financial adviser, your career is spent guiding clients toward achieving long-term financial success. But as you get further into your career, and look at retirement for yourself, you may want to ensure your clients still receive the best support and advice through a Practice Buy-Out. We understand that your financial advice practice is more than a business. It represents your reputation, your relationships, and your legacy.

A PBO provides a structured, flexible path that ensures the financial security you deserve after years of building a business, while protecting the interests of your clients. Whether your exit is imminent or still years away, a PBO allows you to plan ahead with confidence.

A well-planned PBO ensures:

- You realise the full value of the business you have built.
- Your clients continue to receive the exceptional service they are used to.
- You transition smoothly, whether gradually over time or through an immediate exit.

**At Foster Denovo, we are committed to putting our people and clients first.**

“

*When I decide to retire, I'll have peace of mind that my clients are already embedded into the company.*

- Neal Shepherd

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# 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/join-us/our-vacancies/>

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.

## You can feel confident working with us as:

- Over the years we've won numerous prestigious awards that highlight how our efforts are having a real impact and place us among the top firms in the UK. In recent years we have been shortlisted at the 2024 Money Marketing Awards, recognised in the category 'Advice Firm of the Year'. We have won the Solidus Achievement of Excellence for Estate Planning Award 2023, and are in Advisory HQ's 2022-2023 Top 10 Best Wealth Management Firms & Financial Advisers in London;
- You can trust us for innovative solutions; and
- Our Net Promoter Score (NPS) revealed that our clients rate us as +80 and 82% say we are, 'easy to do business with'.

**INVESTORS IN PEOPLE®**  
**We invest in people** Platinum

Foster Denovo Limited is authorised and regulated by the Financial Conduct Authority. FCA Reg No. 462728; you can check this by visiting Financial Services Register on the Financial Conduct Authority's website [www.fca.org.uk/](http://www.fca.org.uk/).

The Financial Conduct Authority does not regulate taxation and trust advice and some aspects of buy to let mortgages. Some of the fees we charge may be subject to VAT, we will let you know in advance if this is applicable. VAT No. 904 450 842.

# Contact us

**If you would like to know more about working at Foster Denovo, or would like to discuss any of our current vacancies, contact our Director of Private Wealth, Helena Bogdanovski:**

**Call: 020 7469 2800**

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**Visit: [www.fosterdenovo.com/](http://www.fosterdenovo.com/)**

Calls are charged at your standard landline rate.



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