

New Model **Adviser**[®]
of the Year 2011

Midlands Regional Shortlist

New Model **Adviser**[®] of the Year 2011

Methodology:

The New Model **Adviser**[®] Awards are designed to reward the best in financial planning across the UK.

Financial advisers among the 6,000-strong readership of New Model **Adviser**[®] completed an in-depth survey and were judged on factors such as professional qualifications, the proportion of money they earn as recurring fee-based income, and the growth of this portion of their income.

Shortlisted firms were taken through an interview process looking in detail at these areas and additional factors, such as client education and communication, and the use of technology to run an efficient financial planning business.

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The Midlands

Nominees:

Central Financial Planning
Fiscal Engineers
Fortitude Financial Planning
OCM Wealth Management
The Investment Coach
Willow Financial Management