



# VIVID VISION 2023

We can all do something today, that our future selves will thank us for.



## SNAPSHOT OF THE FUTURE

It's 2023.

What an incredible journey we've been on over the last three years. To date, we have created a sustainable business that manages more than £400m of client assets, for 400 families the length and breadth of the country. We've also built on our already strong foundations of integrity, intelligence and an 'in-it-for-the-long-run' approach. We're an aspirational business working with people who want to get the most out life.

# GROWING TOGETHER

Most of our new business stems from recommendations from clients and the people we work with. That's always been the case – and this faith in us is testament to our integrity as a business, and as a group of people all working towards the same goal. On top of this, a successful marketing strategy has helped us gain even more new clients – in fact, we're now welcoming 75 new client families each year.

All of that growth means we've also been able to grow our team and our services. We're now up to seven advisers – four working with existing clients and three dedicated to onboarding new ones. And we've extended our offering to include wills and trusts, a trust company, a tax return service, as well as a range of services to support our clients in later life. We've also introduced discretionary investment management. And of course, we still offer The Financial Success Programme, our unique investment consulting, advanced financial planning and life coaching services.

For everyone working at Citywide (that's more than 30 of us now), this growth is great news. We're a company that people want to work for, and one that offers flexible working, clear career pathways, competitive benefits and an inspiring environment. And we're very proud of our formal skills and education programme for young graduates and new-joiners aspiring to become financial services professionals, is just incredible.

We've made some great leaps in the last three years. But we know the best is yet to come.



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# WHAT WE STAND FOR

## TRUSTED

This is nothing new – it has always been the cornerstone of what we do. Our clients know that we're experts in our field, always try to make the complex seem simple and are absolutely open and honest in everything we do. And if we're going to help clients make important decisions about growing and protecting their wealth, we need to operate with the integrity and competence they expect.



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## CARING

We care about what we do, but also about the people we work with. We think it's what sets us apart from other financial planning companies. For us it's not just about the money, it's what we help our clients do with it that matters. We also care about the world we live in and we show that through our work with local green initiatives, by reducing our carbon footprint and championing sustainable investing.



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## ASPIRATIONAL

We want our clients, their families and our employees to achieve a high level of success, but we also want to be the best at what we do. Our service is innovative, intelligent and completely independent. It's built on decades of experience, robust scientific research and a constant drive to keep improving. Happily, it works.



# OUR CULTURE

Nothing is as important to us as this.

It's what helps us attract the best people - both to work with and work for. It's at the heart of how we engage with our community, our commitment to sustainability and our passion to build a better world for everyone. Our culture is based on these five key pillars - and it drives everything we do.

## 1 TRUST

We work hard to build trust with our clients, staff, suppliers and our community.

## 2 RESPECT

We promise to respect everyone we work for and work with.

## 3 SHARED EXPERIENCES

We'll be by your side each and every day, helping you achieve great things.

## 4 MUTUAL ENJOYMENT

We only want to work with people whose beliefs and values make us happy.

## 5 RECIPROCITY

We want to look back at the journey we've shared and get a sense of pride and satisfaction from a job well done.





## WHAT IT'S LIKE TO BE A CLIENT

Being a Citywide client is not like working with an ordinary financial planner. It's more like working with someone who really cares. We're all trained coaches so working with us is a more holistic experience. We start with a vision of the road ahead and talk to you in a way that few other advisers do. Sometimes our approach is challenging – but it will help you think about where you want to be – and what you need to do to get there.

People are busy and they all have their own worries or concerns about the future. But the most important questions are nearly always, 'Where am I?' (in terms of financial independence) and, 'Am I going to have enough?'. We're here to answer those questions and shoulder some of the load, so you're free to make the most of life right now.

## WHAT IT'S LIKE TO BE A PART OF THE TEAM

We spend a lot of time working, so we put a lot of effort into creating a great environment for our people – and they in turn respond by supporting each other. Yes, we work hard and have very high standards. But the reward is that we know what we do is valued – and that makes this such a special place to work.

We also like to have a bit of fun – so a sense of humour goes a very long way here. And if you're keen to learn and grow, you'll get your chance – because we know that's something that benefits our clients as well as ourselves. For the same reason, we're always keen to embrace new technologies. Anything that lets us continuously improve our systems to offer an even more amazing service to our clients is great by us!



## WHAT IT FEELS LIKE TO BE PART OF OUR COMMUNITY

If there's one thing we know, it's that life's not just about taking, it's about giving back too. That's why we're incredibly proud to have joined forces with Surrey Hills Enterprises, a Community Interest company supporting the special Surrey Hills Area of Outstanding Natural Beauty. Our partnership will help build sustainable growth in the Surrey Hills by developing a hub of innovative, high quality local products and services.

We're also delighted to have set up a Citywide Foundation, to support those around us in the community and build resilience in young people by helping them get involved in outdoor activities. And, in our day-to-day work, we never miss an opportunity to connect professional people that can help each other or promote businesses that we know do a great job.

## WHAT IT FEELS LIKE TO BE A PART OF OUR WORLD

Taking care of our community is incredibly important, but we also feel a great responsibility to think about the impact we're having on the world. Our aim as a business is to have a positive effect on the environment rather than a negative one. In fact, we're well on our way to being a 'net-zero' carbon business. We're doing that by making changes to how we work, by offering state-of-the-art ESG funds to our clients, as well as taking a low-carbon investment approach.





# WHY IT MATTERS

We never let ourselves forget that the work we do at Citywide Financial Partners has a lasting impact on the families we work with, the people we employ and the wider community around us. This isn't just about dealing with our clients' money, it's about being a catalyst for good.

We help families build financial independence and live their lives to the full. We take away their financial worries and encourage them to do incredible things they maybe never thought possible.

*"It's about being a catalyst for good."*

We help our staff build rewarding careers, where they feel valued, fulfilled. Where they are supported to grow as a person and live their best lives too.

Our community and the environment isn't forgotten either. Our aim is to 'make a dent' in the world by supporting others, particularly young people, to grow and thrive. And to do as much as we can to protect the planet for future generations.

# ONE VISION ONE OPPORTUNITY

This vision of our world in 2023 is here to remind us of the things that are important to us now and will be in the future. It's here to shape how we support and serve our clients, while making sure we give something back to the world we live in.

*We can all do something today, that our future selves will thank us for.*





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**Risk Warning**

The value of investments and the income arising from them, can go down as well as up, and are not guaranteed, which means that an investor may not get back what they invested. Past performance is not necessarily a guide to future performance.

