

Adviser case study: Paul Hyde, Beaufort Financial (Mansfield)

Providing the marketing support to help an IFA firm grow

Paul Hyde founded Innovate Wealth Management in September 2009.

Based in Mansfield he and his two advisers work primarily with clients in Nottinghamshire and the wider East Midlands.

His business had always been an Appointed Representative of a network. However, Paul was keen to look at other options. Here's his story:

What did he want?

Following changes at his current network Paul was keen to regain his independent status. He felt that working as a restricted adviser was far from ideal and preferred access to a broader spread of products and providers.

Paul didn't want to seek direct authorisation, preferring to concentrate on delivering high-quality advice and outsourcing certain key tasks.

He also aspired to work with a partner who truly understood and embraced financial planning.

What attracted Paul to Beaufort?

Paul's conversations with Simon Goldthorpe, (Beaufort's Chairman), and Andrew Bennett (CEO) progressed extremely well. So much so, that Paul took the decision to rebrand his business as Beaufort Financial (Mansfield).

Speaking about the change Paul said: "At no point did anyone pressurise me to rebrand. However, I felt that by doing so we would truly become part of a larger group. Furthermore, we would derive greater benefit from the impressive marketing resources Beaufort can offer."

Paul was also delighted by other elements of our support package: "The internal paraplanning service provides support in formulating and researching recommendations. This creates massive time savings for me and my team."



“I’ve been particularly pleased by the marketing support offered by Beaufort; I’ve not seen anything like it elsewhere. From providing our website to client newsletters, the quality and consistency of their output is excellent. I’ve also been impressed with their openness to new ideas, such as Facebook advertising promoting a recent IHT awareness campaign.”

“In short, everything is made easy to go out and see my clients, allowing me to do what I’m good at.”

Paul was impressed with the Beaufort team too: “The people are hugely impressive. There’s a family feel, however from the top-down the team are professional, with a clear vision of what they want to do with the business and where everyone fits in.”

“It genuinely feels that everyone has a vested interest in us doing well.”

Key reasons for joining Beaufort

- Support of a professional brand
- Exceptional marketing for driving enquiries
- Paraplanning service allowing Paul to concentrate on time with clients

How will Paul’s business grow?

Paul and his team only recently joined Beaufort, however the transformation has been immediate.

Paul once more: “The internal paraplanning service creates massive time savings, which frees us up to focus on taking on new clients. Of course, this is made easier by Beaufort’s marketing strategies, which are generating new enquiries for us.”

“The transition over to Beaufort was smooth too. We were made to feel welcome from day one, and financial support was put in place to make the move easier.”

“I’ve no doubt that we’ve made the right decision and our business will flourish thanks to our relationship with Beaufort.”

Would you like to learn more about Beaufort?

If, like Paul, you want to focus your time and energy on the tasks that add real value to your clients, you want to grow your business, or you just feel there’s a better way, we would love to hear from you.

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