

Investment Solutions Wealth Management

- Achieves a record breaking year (again)

As the Worthing based Chartered Independent Financial Advice Firm – Investment Solutions approaches its 30th Anniversary, the company broke all records in 2017 with client assets under management now exceeding **£325 million**. The recognisable Firm with the ‘Snowdog’ at the front of the office is now one of the largest Financial Services practices in Sussex, without any external shareholders, providing individual and bespoke advice to its clients within the South East and further afield.

A delighted Ivan Lyons, Managing Director explained:

“Our success continues to be down to the quality of our staff and to providing good old-fashioned face to face advice”.

Investment Solutions have been providing financial planning advice in the local area since 1988 and the scope of their expertise encompasses the full range of regulated activities, covered by the Financial Conduct Authority. The Company very much prides itself on being the best within the financial services world with all of the Directors and Financial Planners qualified at Chartered level. The Company have won a number of awards of late, including:

New Model Advisor “Top 100 IFA 2017 and 2016”

The judges awarded Investment Solutions as a Top 100 IFA within the UK for the second year running. “Strong growth over the past 2 years, with assets under management increasing from £220M (2015) to £254M (2016) and to £325M (2017) were found to be impressive, as well as the company investment process, client returns and the financial strength of the organisation”.

Locally, the company won **“Medium Company of the Year”** 2016 by Adur and Worthing Business and in 2017 were shortlisted for “Medium Company of the Year South East”. These awards celebrate business excellence.

Citywire – Shortlisted Top IFA Firm “South East England” 2018 and 2017

For the second year running, Investment Solutions were shortlisted within the Top 5 IFA Firms within the South East of England by Citywire.

The judges were impressed in regard to the deliverance of Investment Solutions guarantee



provision of service to clients – via a service contract with each client, which continues to prove popular, evidenced by positive reviews on sites such as VouchedFor (a website where the public can rate their Financial Adviser).

Ivan comments:

“VouchedFor is an independent service that allows the public to find, rate and review their IFA. For the 5th year running, Investment Solutions have been rated as the highest rating Firm within Sussex.

David Connor, fellow Director commented:

“This objective, plus the fact that the company is wholly impartial and independent, with no external shareholders, makes us almost unique in the field of wealth management. Perhaps as a result, we are the only Firm in West Sussex endorsed by

Solicitors Independent Financial Advice (SIFA), who recommend that lawyers refer financial services work to such firms”.

Previously, the Company purchased one of the Snowdog’s which were displayed on the streets in Brighton in aid of The Martlets Hospice. “Worthy” can be seen outside the office and in recognition of the Chinese “Year of the Dog” – the Company are supporting Clymping Dog Sanctuary as its preferred charity of 2018.

www.investment-solutions.co.uk

Facebook: www.facebook.com/

financialadviserworthing

Twitter: @investment_sols

Tel: 01903 214640

Investment Solutions

Trusted and Experienced
Chartered Financial Planners

- Investment Advice
- Pensions and Retirement Planning
- Insurance Advice
- Tax Planning, Estate Planning and advice on Inheritances
- Specialist advice for High Net Worth Individuals and High Earners
- Equity Release and Long Term Care

Investment Solutions, Grafton House,
26 Grafton Road, Worthing, BN11 1QT

Telephone 01903 214640

www.investment-solutions.co.uk

facebook: www.facebook.com/financialadviserworthing

Twitter: @09800806060

“Investment Solutions” is the trading name of Investment Solutions Wealth Management Ltd who are authorised and regulated by the Financial Conduct Authority.

