

Who we are and what we do



**FURNLEY
HOUSE**

FINANCIAL PLANNING PARTNERS



FURNLEY HOUSE

Who We Are

Furnley House is a firm of Independent Financial Advisers and Mortgage Brokers. Founded in 2013 to solve the issue of a lack of good quality, accessible advice available in the market place, Furnley House has quickly grown into an established, successful firm of advisers, helping thousands of happy clients work towards their financial goals.

Who We Are

Our family

When we formed, most of our founding clients were friends and family members. People who knew us and put their trust in us. And in return, our goal was simple: to deliver on that faith shown. That meant always putting the needs of those who supported us first, always trying to go above and beyond, and importantly, always knowing and doing what is right.

As we have grown, that ethos, that way of doing business has never changed. Except now our family is much bigger. The way we see it, when you become a client of Furnley House, you become part of our family. And that means, always trying to deliver on the trust you have put in us.

Our mission

We want to consistently deliver the finest client experience available, never forgetting whose money we are looking after, never forgetting the job we have been asked to do, always focused on you and your dreams.

We measure success by the positive impact we make to the lives of our clients. By collecting regular feedback from our clients, we are well informed on how we're doing and are continuously striving to do better in line with your needs.



Our approach

We believe in the way we do things; our resolve to do things properly and our diligent approach to creating, protecting and preserving wealth. And that's what sets us apart.

And as much as we embrace innovation and technological advances, our expectations will never change. For good, will never be good enough.

Our values

We have been able to achieve this by having strong values and a team of people who live by them.

Our values guide our actions and define our behaviours – everyone at Furnley House lives by our values and their impact on our clients, our staff, professional connections and our community.

Our invitation

We all face the hard reality that the future will not take care of itself. Looking for a financial planner that treats your hard earned money with the respect and the importance that it deserves is a decision that should never been taken lightly.

At Furnley House we will never be bold or cavalier with your wealth. That's just not our way. Rather we aim to deliver satisfaction; meeting critical needs over time and achieving your investment objectives by only taking the appropriate levels of risk, always acting appropriately, empathetically and professionally, methodically, sensibly and calmly. And that's the way it should always be.

We are Furnley House. Your financial planning partners.

Furnley House - always focused on taking care of that which is precious; your wealth.

WHAT WE DO

Financial planning encompasses a wide range of expertise: from saving for retirement, buying a home and protecting your family to the mitigation of inheritance tax and planning for long term care.

We are here to help you achieve your financial goals. Whether that be the creation of wealth, its maintenance and growth, its protection, preparing for both the foreseen and the unexpected or ultimately its transfer through generations, we can help you.

Through the development of bespoke financial strategies and solutions for the management of your financial affairs, our Financial Planners will ensure your goals remain on track.

Predicting rain doesn't count. Building arks does.

Warren Buffet



What We Do

Successful financial planning isn't about market timing or 'gut feeling'. It's about having robust processes, working to a plan and delivering to your objectives.

It requires care; whether that be through sensible, bespoke investment management aimed to secure and increase real value over time, or through the building of appropriate mechanisms to guard against the unknown.

We aim to deliver an outstanding client experience with investment management behaviour in line with that discussed and agreed with you at the "point of advice".

This means not trying to be clever or taking unnecessary risk, but instead agreeing a plan with you that will deliver to your objectives and sticking to it.

We are independent, with no ties or allegiances to any one provider.

That means you benefit from the investment solutions, expertise, products and services from the whole of the market. We're also privately owned so we run our business with your needs in mind.

We have been recognised as one of the best advisers in the industry

The Financial Times and New Model Adviser publications have recognised Furnley House as one of their 2019 Top 100 advisers in the UK.



*Change your life today
Don't gamble on the future;
Act now, without delay*
Simone de Beauvoir

What We Do

We can offer our expertise in the following areas:

- Investment & retirement planning
- Wealth management & inheritance tax planning
- School & education fees planning
- Life assurance & family protection
- Income protection
- Critical illness cover
- Long term care fee planning
- Mortgages
- Re-mortgaging
- Buy to Let mortgages
- Mortgages for first time buyers
- Mortgages for the self employed
- Post retirement planning
- Workplace pensions
- Employee benefits

And in the end, it's not the years in your life that count, it's the life in your years.

Abraham Lincoln



OUR SERVICE PROPOSITION

At Furnley House we like to think of our service proposition as more of a 'Dream Factory'. Whilst that may make you smile, it's something we're very serious about. As a client of Furnley House, dreaming, and in particular, dreaming big, is something we actively encourage.

Simply put, without dreams, there is nothing to aim for. And without an end destination, how can you put together a plan or agree the components required to deliver said plan. But, when you have a dream and a plan, then amazing things can happen.

In delivering the 'Dream Factory' there are clearly defined stages, all designed to develop:

- An appreciation of your needs, circumstances and direction
- A knowledge of how you wish to be treated
- Sincere and valued long term business relationships



STAGE ONE

Getting to know you

Before we offer any financial advice, we first need to get to know you and understand what you're looking to achieve. During your financial review you will not only have the opportunity to meet and get to know your Furnley House Financial Planner, to discuss your personal circumstances and plans but you will also be fully informed of our charges and services. Your Financial Planner will seek to ascertain your financial goals and requirements (dreams) and, using a market leading risk profiler, determine your attitude and understanding of investment risk as well as helping you make your decision as to what sort of services you require and how you would like to pay for them.

(Note: The cost of the initial financial review is at our expense).

With a clear understanding of your circumstances and requirements your Furnley House Adviser can put together a plan to help you achieve your objectives.

STAGE TWO

Research

With a clear understanding of your circumstances and requirements, the next stage is for your Financial Planner to put together a plan to help you achieve your objectives. During this stage your Financial Planner will research the market to find the best solutions to meet your needs. As Furnley House are completely independent, that means reviewing the entire market.

STAGE THREE

Recommendation

With the research completed, your Financial Planner will now present their recommendations. Included within this they will show you why they have chosen particular providers, why they have ruled out others, and how their proposal will help you achieve your goals.

Your Financial Planner will seek to ensure your full understanding of all benefits and costs associated with your decisions and discuss with you your on-going service based requirements. All advice and decisions made will be submitted to you accurately in writing for your records.



Furnley House will research the market to find the best solutions to meet your needs. As we are completely independent, this means reviewing the entire market.

STAGE FOUR

Implementation

With your approval, the next stage is the implementation of advice based on your needs and priorities agreed. It is here where the agreed plans and strategies are put in place, in full or in part.



STAGE FIVE

Ongoing service

Depending on your requirements, we will wish to maintain contact with you and review your situation, your plans, your attitude to risk and your investment progress at a frequency most suited to your needs. As time goes on your circumstances and attitudes will change and it is important that we adjust and maintain your strategies, where appropriate, to ensure the on-going effectiveness of your financial planning.

Once your plan is in place, your Financial Planner will concentrate on ensuring that your investments are performing to meet your objectives by means of regular reviews, with advice built upon considered and consistent research formulated by our experienced back-office team.

We also advise on ethical investments and are happy to discuss Environmental, Social and Governed (ESG) investments with you

MAKING A DIFFERENCE

To us it's not just about being "good"; it's about doing good too. We want to help create a world worth living in, for today and tomorrow; to enable people to live the best life possible. We want to make a big difference; to people, the environment and society as a whole. We take this part of our business very seriously. It's important to us and it always will be.

And this isn't all talk. To help us back up and deliver what we say we've launched our own charity:



The Furnley House Foundation is our way of giving back. Each year we run a number of activities including our annual Summer Ball amongst others, all designed to raise funds for those in need within our community. The Foundation helps both registered charities looking to raise funds for research and equipment, along with local causes that might be looking for help to fund projects.

The Foundation is a completely independent entity, governed by a trust deed and overseen by a board of trustees that consists of Furnley House staff, clients and business connections.

You can read more on our website, and can contact us if you'd like to get involved or apply for a grant. We'd love to hear from you.



Our Promise To You

We believe our service to be the best. If for any reason you're not happy as a client of Furnley House, we will do our best to resolve any complaints you may have. Should you decide you would like to move to a different IFA, we will prepare a full leaving pack at our expense. This pack provides a full breakdown of all your investments and finances, making it easy for another IFA to review your assets and requirements, thus simplifying their onboarding process. We're confident that you'll love our service.



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What our clients say

Steve fully understood my needs and conveyed a very complex solution to me in a straightforward manner. I would definitely recommend him to friends and family.

S Owen

Paul was very helpful, friendly, knowledgeable and understood what we were trying to obtain.

B Kirby

Thank you so much for making the processes of getting a mortgage, remortgaging & arranging life cover a lot less painful than they could have been.

R Buckby

I am very satisfied with the level professional advice given and the personal service I received from Furnley House.

S Cox



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Furnley House Limited is authorised and regulated by the Financial Conduct Authority (ref. 624579).

Past performance is not a reliable indicator of future performance.

There will be a fee for the mortgage advice. The precise amount will depend upon your circumstances but we estimate that it will be £295 if you are re-mortgaging and £395 if you are buying a home.

YOUR HOME MAY BE REPOSSESSED IF YOU DO NOT KEEP UP REPAYMENTS ON YOUR MORTGAGE.