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become happier in your work. Be more
successful in what you do. Have a
better work life balance. Our adviser's
happiness is what separates us from
our competitors. We offer a service
which enables our advisers to retain
their independence with their clients,
but takes away a lot of the repetitive

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regulatory administration and provides
you with the resources you need to
develop your client network and work
life balance.

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Read Book The Happy Financial Adviser How To
Launched in 2017 the book has also gone onto receive many 5 star reviews. The book focuses on embracing happiness in order to achieve greater success for financial advisers and their clients. Advisers are encouraged to connect with more people, have the freedom to be

Read Book The Happy Financial Adviser How To themselves and make a positive difference. Author, Andrew Goodwin, who is the Managing Director at Financial Services company, Truly Independent, said: "As you might expect I'm very "happy" about the success of the book.

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Score. The Happy Financial Adviser
scorecard measures your current
business position against our
benchmarked IFA lifestyle business

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AND identifies areas requiring action to ensure you have a more financially rewarding and happier lifestyle business. At Truly Independent Ltd, we recognise that when our advisers are happy in their work, they are more productive and their clients are happier too!

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The Happy Financial Advisers -
Scorecard

□The Happy Advisor is a tool that all financial professionals must have in their arsenal. Bill Smith is a master storyteller and jumps inside the heads

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The Happy Advisor: Bill Smith

The financial adviser happiness test
will only take around 10 minutes and is
just a series of yes/no questions and

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answers. The scorecard aims to measure your current business position against our benchmarked IFA lifestyle business and identify areas which could help you have a more financially rewarding and happier lifestyle.

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IFA Happiness Test - Scorecard -
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How to find and employ a financial
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1. Figure out what you need. If you

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need retirement advice, it might be best to go for an adviser who specialises in pensions. If you need a complete financial plan, go for an adviser who offers the whole package rather than just focusing on, say, investment advice. 2.

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product for you. While the advice isn't free and DIY options are available, if you're looking at getting a complex product, even some money-savvy people see the value in paying for an adviser to ensure they get it right.

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