

## Adviser Profile

Noel Farrelly of Index Wealth Management - ISO 22222 Certification

Index Wealth Management takes care of the financial interests of a limited number of wealthy entrepreneurs, higher earners and their families. It is run by two directors, Les Phillips and Noel Farrelly. They are supported by a world-class backup team, utilising the very latest technology and tools to provide 21st-century service to their clients. Both Les and Noel are Certified Financial Planners, with Noel also holding the Chartered qualification; both are qualified pensions specialists. The firm won the highly prestigious New Model Adviser award in 2006 and are proud that they are so far the only National winner.



IWM is an investment led practice basing our recommendations upon Nobel prize-winning research and Modern Portfolio Theory. Our aim is to provide our clients with "sleep at night" investing and we do this by paying particular attention to risk within client portfolios. We are at the hub of a number of different services for clients and act as a clearing house, recommending other qualified professionals where appropriate. Our approach allows us to help clients protect and grow their core capital, generate rising quality income when required and enjoy the lifestyles that they want. We work as fee only advisers, allowing us to provide truly objective advice, truly adding value and developing lifelong relationships with our clients.

"We at Index Wealth Management decided to test our systems and procedures against the international standard, ISO 22222, in order to ensure that we are meeting the very highest standards when delivering our services to clients. We were aware we had worked very hard to install the best systems and procedures we possibly could but felt that a third-party professional view could only bring improvements. This proved to be the case and Standards International were able to point out a number of areas where we could add to our proposition and also save staff and clients time".

The ongoing benefit to their firm is that they are aware of the high standards required for ISO 22222 and have raised their standards accordingly. The improvements in their systems and procedures has been incorporated into all of their staff and management meetings and dovetails with their ongoing quest to treat their customers fairly. The advantage to their clients is that they will see a greater level of consistency in their systems and procedures and will always know what to expect from the service proposition; part of the advantage to them is that their clients can always expect to see ongoing improvements to their service.

For fee charging firms such as Index Wealth Management who have completely embraced the new model advocated by the Retail Distribution Review the future is extremely bright. Their greatest advocates are their clients who recognise the value of a systematic approach to investment and the management of their capital; the endorsement of ISO 22222 conveys to them that they take their business practices seriously and can only lead to more client referrals.



*"ISO 22222 is all about awarding professional best practice and I have never seen a pair deserve it more. Noel and Leslie make a great team and it has been an honour to work with them through their ISO certification process"*

Michelle Hoskin, director of Standards International

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**If you would like to find out more information about ISO 22222 or would like to find out more about the benefits of a achieving certification please contact:**

**Michelle Hoskin on t: 01462 790 894 or e: [enquiries@standardsinternational.co.uk](mailto:enquiries@standardsinternational.co.uk)**