The Institute for Financial Wellbeing’s Corporate members

Equilibrium’s core services combine financial planning, investment management and tax mitigation and their purpose is to make people’s lives better. Founder Colin Lawson says: "This includes the advice and support we give to clients to help them live the life they want, look after those they love and to leave a powerful legacy, to the internal training programmes to help develop our team as well supporting local causes through the Equilibrium Foundation."

Find out more.

Kenwell is the story of a number of experienced financial services professionals who have come together to create the business they always wanted to build. In 2020, David Howell and John Kenny-Levick met to discuss creating a financial advice business that was focused on a person's financial wellbeing first, and their money second. They wanted to build a practice where the main product was *financial advice* and not simply a distribution service for financial products. From this conversation Kenwell was born. David and John commenced the UK operations and began to assemble a team of like-minded advisers and administrators.

"Kenwell exists to improve the financial wellbeing of our clients. We believe that families who are in control of their money have a higher likelihood of living happy, fulfilled lives. This, in turn, contributes to a better and more prosperous society.
The concept of wellbeing generally, and financial wellbeing specifically, is central to our purpose and inherent in our value proposition. Indeed, all that we do seeks, as a final measure, to improve the financial wellbeing of our clients." **Find out more.**

Since 2000, **Ovation Finance Ltd** has been providing truly Independent Financial Advice to clients. Ovation is a chartered company committed to an expert approach in pensions, investments and planning. They offer Financial Wellbeing to make clients happier as well as wealthier.

Their financial team are interested in more than just money and are dedicated to building client relationships, using coaching skills to understand what clients want from life. Using technical knowledge, they look at how income and assets can be used to help a client gain clarity over their future.

The team are proud of what Ovation has become, and protective of the reputation they have forged among their clients, among the professional community, and within the industry. **Find out more.**

Paradigm Norton is a leading UK financial planning firm, and exists to help clients articulate and realise the things that are most important to them in life.

“Money and financial wealth are not ends in themselves, they are the means of achieving the goals and dreams we hold dear. @e all have things in life that matter deeply to us and that we'd love to enjoy, experience, and see accomplished. And yet often, our finances and our financial decisions operate in a vacuum, disconnected from those goals and dreams. Financial planning isn't just about products and the accumulation of wealth. It's about what's uniquely important to you, and the careful application of these things to build a bespoke roadmap to help you achieve them. It's about bringing your finances and your goals, dreams, and passions together. Financial planning is about helping people say: ‘I'm glad I did . . . ‘, not ‘I wish I had . . . ‘ That's what we do.”

Find out more.

Wensons offers a unique blend of expertise in financial planning, legacy planning, and financial coaching, while also prioritising financial wellbeing. Through education, coaching, and consultancy.

At **Wensons Financial,** the financial planning process begins by understanding your values and life aspirations to create an individualised plan that enables you to make well-informed decisions. “We believe that financial advice should never be unnecessarily complex, and take pride in offering clear and reliable guidance tailored to your specific goals and lifestyle.”

Wensons Legacy provides Financial Coaching, providing a deeper understanding of emotions and behaviours regarding money. “Wherever your journey is leading you, and whatever you want to achieve, our focus is on educating, empowering, and being your accountability partner.”

Find out more.