

Talking business with...

Marcus Woolley

Ideal Financial Solutions

Have you always been involved in the financial industry?

No, my first love has always been football so when I left school at 16 I undertook a two year apprenticeship under Harry Redknapp at AFC Bournemouth, playing football every day – when I was released, it took about 6 months to a year to eventually start working for an Insurance Brokers, who I worked with for thirteen years.

What made you want to set up your own financial solutions company?

I've been fortunate in that I've inherited a Firm 18 months ago that was already established, so it was a natural thing to do and become my own boss as well as looking after other Adviser's.

How did IFS begin?

Ten plus years ago, two friends who were working for separate companies got together and started up the Firm – it's developed from there really.

How would you like to develop IFS?

IFS is still in many ways embryonic, although as individuals there's nearly 40 years of experience in financial services between us – we pride ourselves on a personal service so fundamentally that's the way we plan to continue as that's got us to where we are now.

Have you any plans to further develop or expand?

Absolutely – Rome wasn't built in a day, those that think it is either aren't around any longer or won't have longevity. There needs to be a solid base and structure which particularly over the last 18 months we've worked hard to implement and have achieved. It's also very easy to identify the want for more Advisers, but these have to be the right people and fit in with the make-up of the

Firm. We stand for longevity, so we will develop and expand but not for the sake of developing and expanding, rather when the time is right.

Do you have any particular goal or objective you would like to obtain?

Yes, to continue to be able to sleep well at night, to know that we're offering an honest professional service and making a difference.

Do you have any personal goals you would like to achieve in your career?

The sportsman in me makes me extremely competitive, but also motivated with a belief in the plan I have moving forward – success can be measured in many ways, I know my meaning of success which I'll keep to myself. For now, knowing that I make a difference in people's lives and seeing the differing journey's everyone goes through gives me a huge amount of pride and pleasure.

You offer a business protection service. How would you stress the importance of this to your potential customers?

Arguably, an individual's business is as important as their Family. Think about this, the 'breadwinner' so to speak provides through their business – now take that individual's business away, commonly through health, and what does that do to their family? The majority of people insure themselves, but not their livelihoods, so there's a massive gap in this area which can only be breached by education.

Is helping businesses something you have always been keen on pursuing?

Definitely, there are so many ways that we can help businesses, and in particular Limited Companies, which seem to be flavour of the month when talking to accountants. Not only through business protection, but tax efficiency,

retirement planning, staff loyalty and the big topic at the moment in the shape of Auto Enrolment.

What makes your business stand out from your competitors?

Simple – as part of CPD requirements, I invariably attend local and regional seminar's where my peers average (conservatively) age is in the upper fifties. I talk to these people but they're stuck in year's gone past. We represent, albeit an all too few, breed of younger financial adviser's keen to drag our industry into the 21st century – similar to any industry, times and method's move on so unlike many others we've embraced these changes and that's where we make a difference and will hopefully continue to do so and prosper.



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How would your business cope if the unthinkable happened?



We can help protect your business

How would your business cope if you died or were diagnosed with a critical illness and could not work? What if one of your co-owners dies and a loan, an overdraft or a commercial mortgage has to be repaid early? You can protect against these events, but the end level of protection you need depends on your personal circumstances. So why not call your adviser and check you have the right plans in place?

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