

Vouchedfor

How to benefit from the UK's biggest
'value of advice' campaign in 2025



Our panel



Alex Whitson
Managing Director
VouchedFor



Phil Bray
Director and Founder
The Yardstick Agency

What we'll cover

The 2025 'value of advice' campaign?

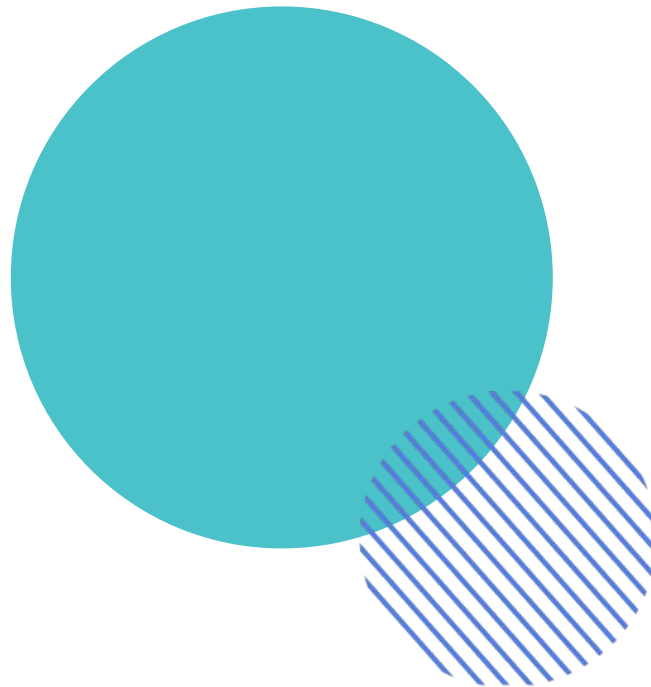
- Why it's important
- What's new this year
- Key dates

How you can benefit from the campaign

- Why (and how) every firm can claim a free profile on VouchedFor to boost their presence
- Using client feedback to win new clients

Actions to take today

Questions

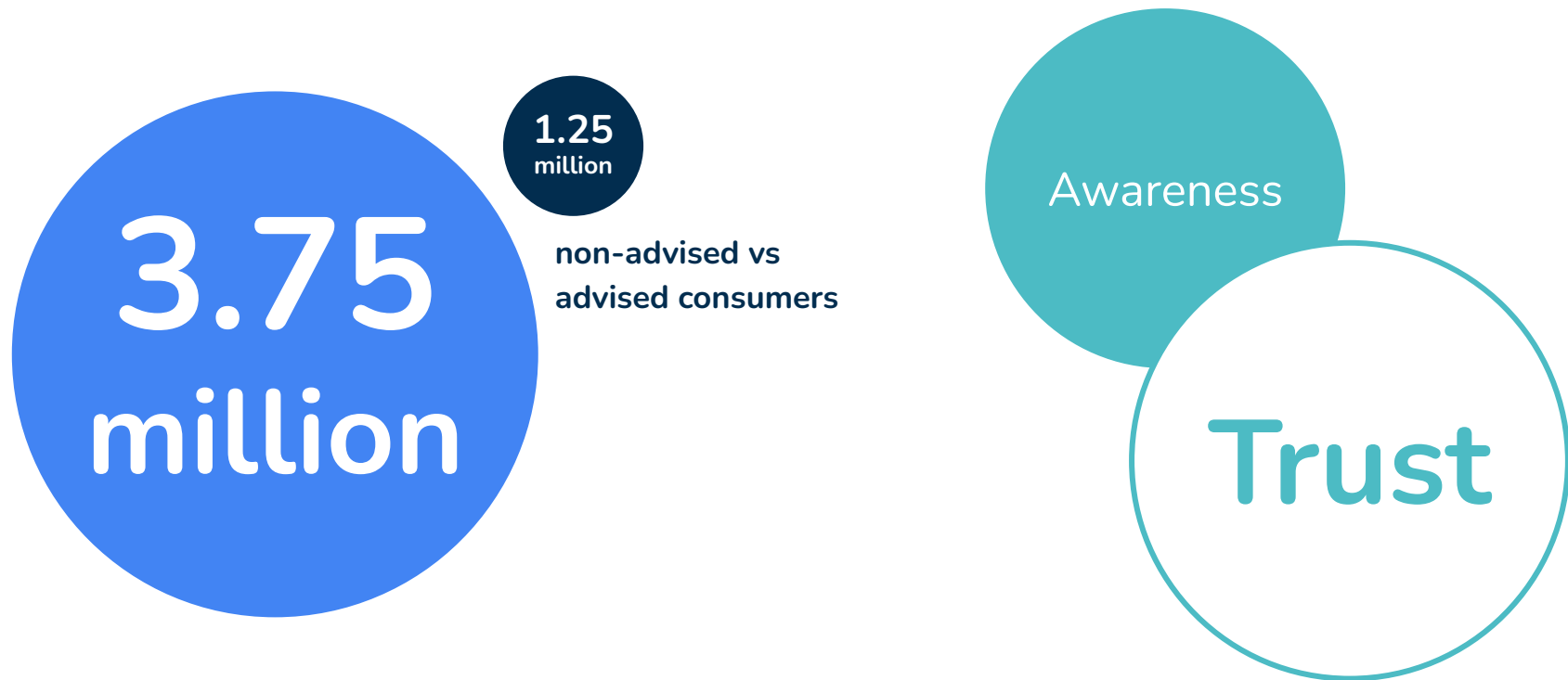




The 2025 'value of advice' campaign

Building trust and understanding in the profession

Championing advice has never been more important



Press coverage does little to help build trust

PACIFIC LEGAL PART OF LEVY & MORGAN

HAVE YOU USED ST JAMES'S PLACE IN THE LAST 10 YEARS?

YOU MAY BE ENTITLED TO COMPENSATION
NO WIN NO FEE

JOIN THE THOUSANDS OF SIP CUSTOMERS WHO HAVE SUCCESSFULLY CLAIMED TODAY

St James's Place has not paid more than £100 million for redress to clients who have invested in SIPs, Premiums and other investments since 2013.

The regulations state that those receiving advice should have regular reviews with their financial adviser to ensure that the products they are recommending are suitable for the customer.

For anyone who has not received a review every year, a refund of the charges plus compensatory interest should be paid to them.

Each time the adviser fails to meet that deadline are breaching their agreement with the customer.

Therefore, the customer made entitled to the appropriate fees being returned and additional compensation.

IF YOU THINK YOU MAY QUALIFY FOR A CLAIM, OUR EXPERT TEAM ARE READY TO HEAR FROM YOU!

CONTACT US FOR A NO-OBLIGATION CONVERSATION
CALL 0808 189 0945

QUICK & EASY PROCESS
All the work is completed by us, saving you time.

TRUST THE EXPERTS
We are a trusted, and leading, specialist litigation law firm.

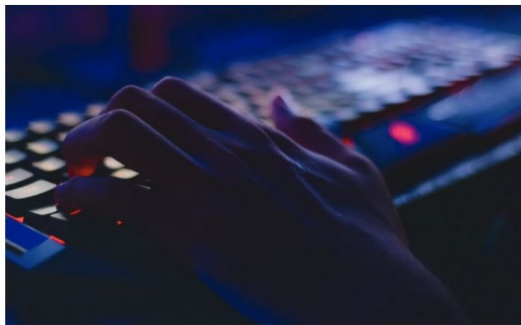
SCAN THE QR CODE TO START YOUR CLAIM NOW

THE TIMES 2024 Best Law Firms 2024

9m people caught out by financial scams in past year, Citizens Advice estimates

Fake debt advice being offered on social media and fake QR codes at car parks are common scams, the charity said.

Citizens Advice: 9 million Britons hit by finance scams last year



One in five people across the UK fell victim to a finance scam – such as a fake pension or investment opportunity – in the last year, Citizens Advice has revealed. The charity estimates 9 million people have been affected.

Showing the worrying toll these scams can take on people's lives, over two in five of those scammed (43%) had to borrow or increase their debt in some way to get by

Scamwatch: 'Help! Scammers have scuppered my mortgage application'

Which? helps a scam victim to clean up their credit report

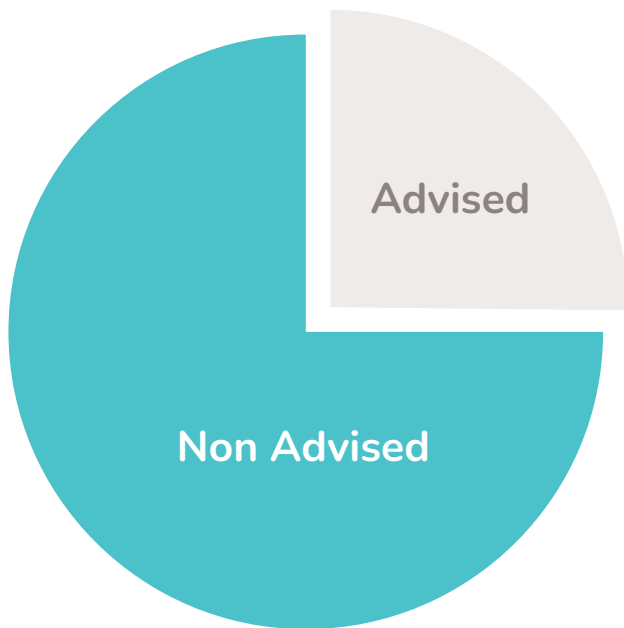
5th July 2024

Most common mortgage scams and how to avoid them

More advice = more consumer wealth = more AUM

33%

of people hold >25%
of investable assets in
investments



Advised

80%

of people hold >25%
of investable assets in
investments

Non Advised

Our ambition: make the 2025 campaign the most impactful ever

- ✓ Reaching 3 million people in The Times, The Telegraph and online
- ✓ A regional, digital Guide will be seen by ~1 million people
- ✓ **NEW** claim a free firm profile on VouchedFor (1m+ visitors p.a.)
- ✓ **NEW** national press and digital campaign sharing real human stories
- ✓ **NEW** video content to help you engage potential clients
- ✓ **NEW** national awards ceremony

The Guide 'bangs the drum' for good advice



6 years
celebrating the
profession



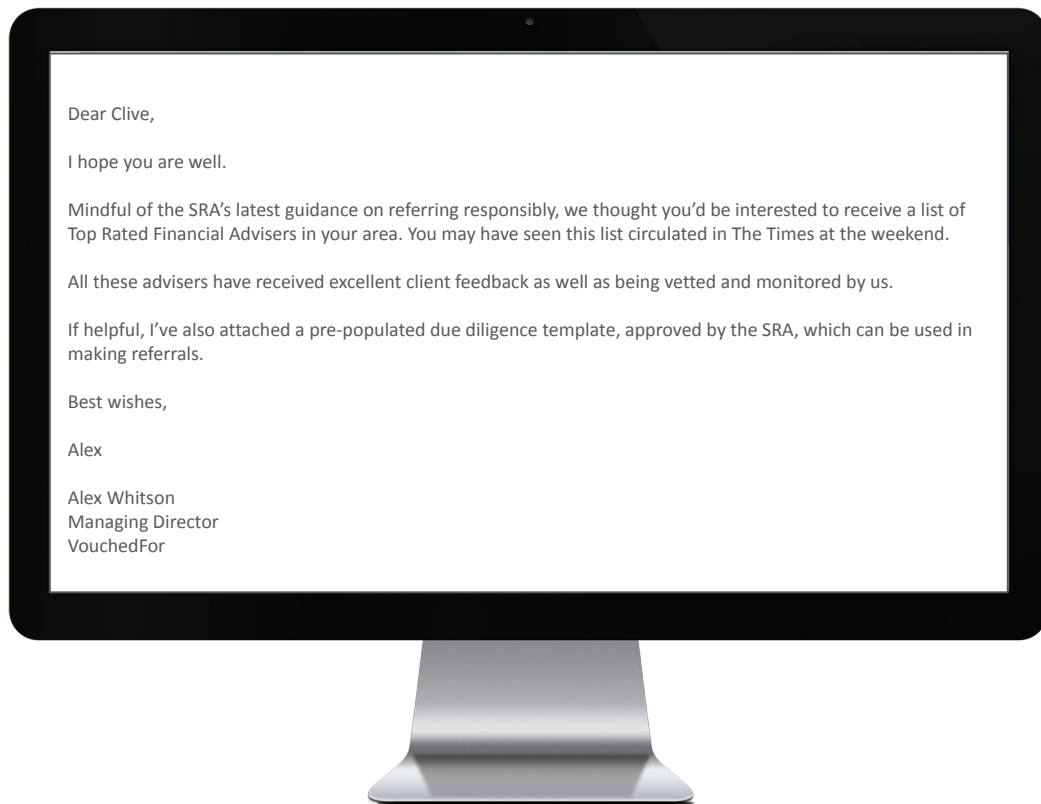
THE TIMES

The Telegraph

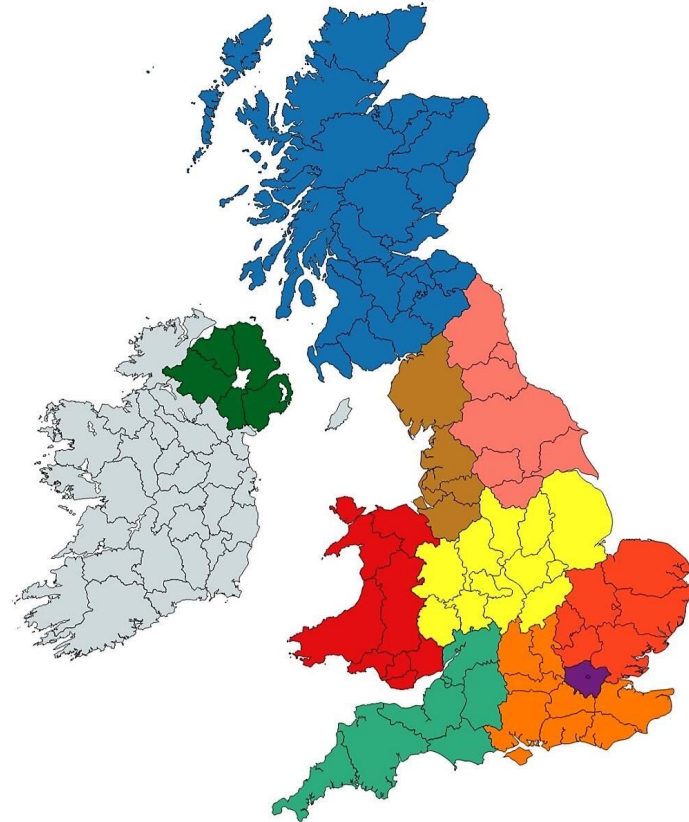
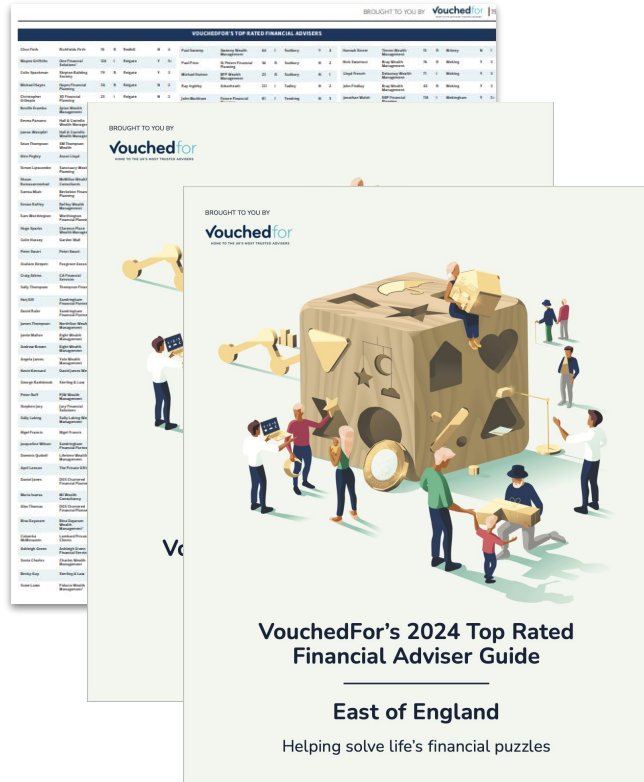
Reaching over **3 million**
people through The Times,
Telegraph, and online

vouchedfor

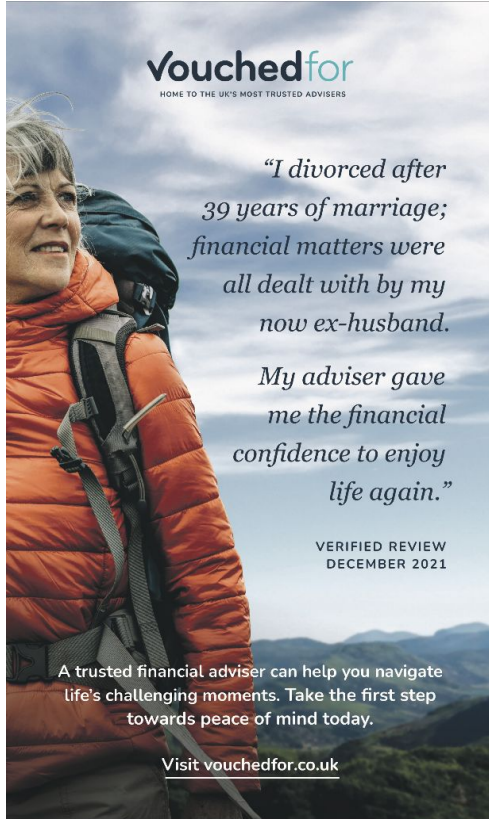
We will also send it to 1,000s of solicitors and accountants



A regional Guide distributed regionally to ~1 million people



NEW national press and digital campaign



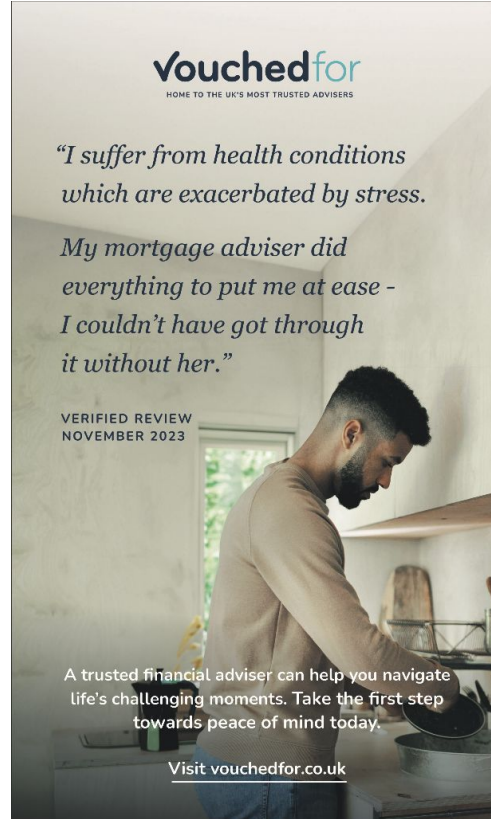
Vouchedfor
HOME TO THE UK'S MOST TRUSTED ADVISERS

"I divorced after 39 years of marriage; financial matters were all dealt with by my now ex-husband. My adviser gave me the financial confidence to enjoy life again."

VERIFIED REVIEW
DECEMBER 2021

A trusted financial adviser can help you navigate life's challenging moments. Take the first step towards peace of mind today.

Visit vouchedfor.co.uk



Vouchedfor
HOME TO THE UK'S MOST TRUSTED ADVISERS

"I suffer from health conditions which are exacerbated by stress. My mortgage adviser did everything to put me at ease - I couldn't have got through it without her."

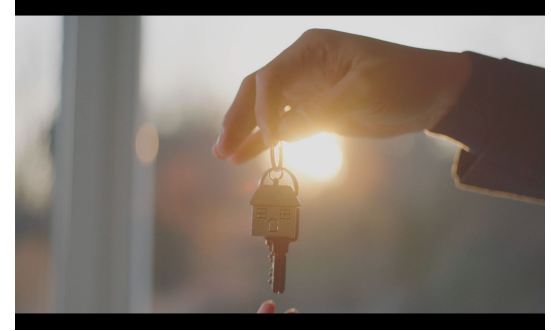
VERIFIED REVIEW
NOVEMBER 2023

A trusted financial adviser can help you navigate life's challenging moments. Take the first step towards peace of mind today.

Visit vouchedfor.co.uk

Reaching **millions** in the
The Times and online

NEW video content to help you engage potential clients



I wanted to buy my first home but suffer from a mental health condition and heart condition that is exacerbated by stress and anxiety.



My adviser listened to me, and did everything to put me at ease. And now, here I am, a homeowner! I couldn't have got through it without her.



CLIENT EXPERIENCE

AWARDS 2025

SUPPORTED BY

BlackRock  **Fundment**

Overview

VouchedFor and **Owen James** are delivering a new calibre of awards evening - one judged by clients.

It will start a movement, inspiring the profession to reach the highest levels of client experience.

May 8th 2025, The Biltmore Mayfair



Award categories

FINANCIAL ADVICE AWARDS

Client experience award

Client champion award

Impact award

Client communication award

Client trust award

Client care award

Large firm of the year

Small firm of the year

Adviser of the year

MORTGAGE ADVICE AWARDS

Client care award

Large firm of the year

Small firm of the year

PROTECTION ADVICE AWARDS

Client care award

Firm of the year

Our ambition: make the 2025 campaign the most impactful ever

March

National Guide reaching 1.4 million readers of The Times

April (onwards)

Digital regional Guide reaching c.1 million people online

May

NEW national awards evening

June

National Guide reaching 1 million readers of The Telegraph

January - December:

NEW national press and digital campaign sharing real human stories

NEW video content sharing real human stories, to help you engage potential clients



How you can benefit

Free profiles for every firm

Consumers need a better gateway to advice.

To help stop scams, we're building one, easy-to-use, directory with a free profile for every FCA-regulated firm...

...improving transparency and trust in the advice profession.



Completely free



Quick to set up



1 million site visitors each year

The screenshot displays the Vouchedfor website interface. At the top, the navigation bar includes the Vouchedfor logo, links for 'FINANCIAL AND MORTGAGE ADVISERS', 'SOLICITORS', and 'ACCOUNTANTS', and buttons for 'APPLY' and 'LOG IN'. The main header features a large blue and white graphic with a red checkmark icon. Below this, the 'About' section for TW11 Wealth is visible, describing their experience and offering a 'Read more' link. To the right, a 'Services' list includes 'Investments & Savings', 'Retirement income (annuities, drawdown)', 'Mortgages', and 'Inheritance Planning'. The 'Advisers at TW11 Wealth' section shows three advisers: Jamie Pearson, Sophie James, and Mark Bailey, each with a profile picture, star rating, and a 'VIEW PROFILE' button. A 'Location' map shows the office address in Teddington, London. The 'Awards & Accreditations' section lists three 'Chartered Financial Planners' accreditations from June 2018.

Make client feedback your most valuable asset

"VouchedFor is a no brainer. In terms of value for money, it's incredible.

I don't want to grow stratospherically, but I've had several clients who've come to me directly after reading my client reviews on VouchedFor."

- PAUL HANDFORD, FINANCIAL ADVISER, SANDRINGHAM

- ✓ Profile since July 2020
- ✓ 10 directly attributable clients
- ✓ £2.5m - £3m AUM



vouchedfor

VouchedFor reviews transform advisers' businesses

8 Extra clients per year

...once an adviser is up and running on VouchedFor*

£64k

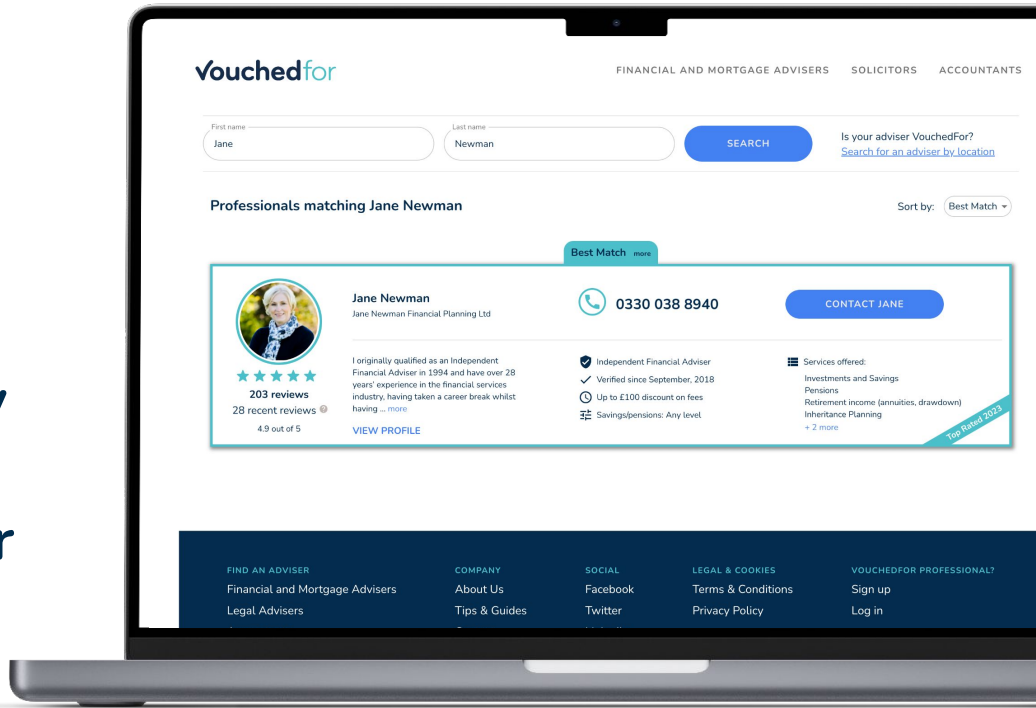
Value-creation per
adviser per year,
assuming £8k LTV
per client

Based on 579 responses from 480 advisers to a monthly survey on the volumes of new prospective clients they have met in the previous month. The results reflect the difference in experience between the median adviser who has been on VF for between 12 & 24 months vs the median adviser who has been on VF for less than 6 months. Direct enquiries through VouchedFor are excluded.

Clients see it's not just them who think their adviser is great
(= more referrals)

79%

of clients are more likely
to refer their adviser to
friends, having read their
VouchedFor reviews



...and accelerate your growth with Top Rated status

“The quality of new enquiries was off the scale.

All we had to do was get Top Rated status and promote that.”

- BRIAN HILL, EX-FINANCIAL ADVISER AND MANAGING DIRECTOR, JONES HILL

- ✓ Featured in the Guide since 2019
- ✓ Added £10m AUM per year for three years
- ✓ Grew total AUM 150% before successful exit



Brian shared his achievement with local newspapers

Trowbridge financial adviser rated highly in Wiltshire

13th January 2014

TROWBRIDGE



Trowbridge-based independent financial adviser Brian Hill Photo: Glenn Phillips (48016)

Share [f](#) [x](#) [in](#) [0 Comments](#)

TROWBRIDGE based independent financial adviser Brian Hill has been voted number one in Wiltshire by his clients.

...and accelerate your growth with Top Rated status

“I can see that clients have already checked my profile before calling me - that gives them the confidence to reach out.”

- ROSHAN VITHARANAGE, DIRECTOR, BVS MORTGAGES

✓ Top Rated mortgage adviser since 2019

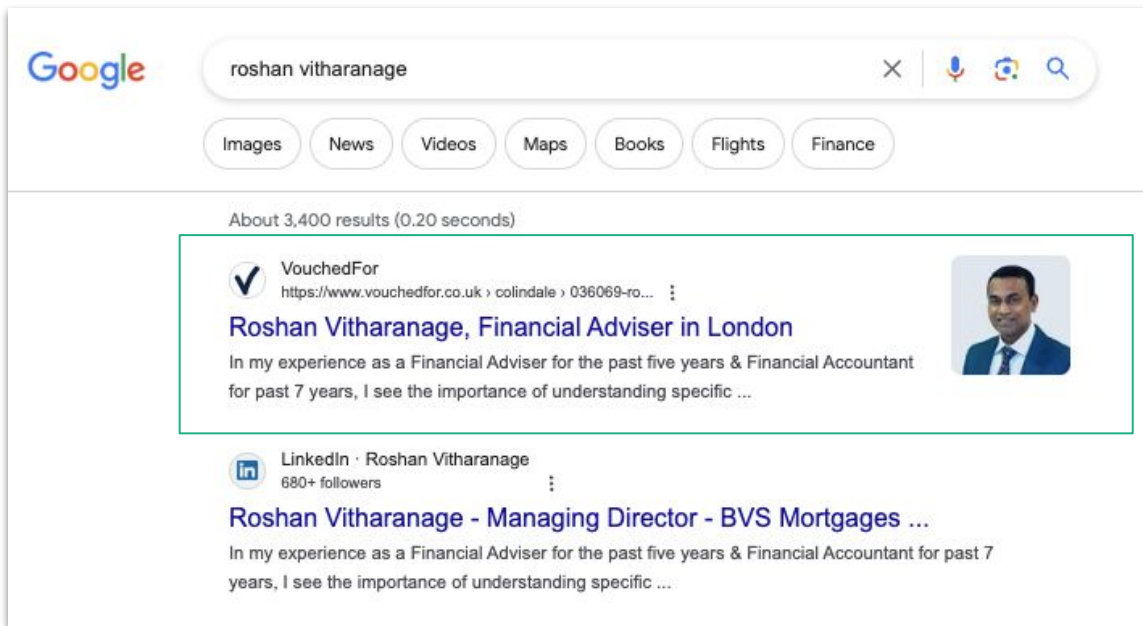
✓ 300 new clients in 2023

✓ 2x YoY growth in 2023



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Roshan's reviews help him rank highly on Google search



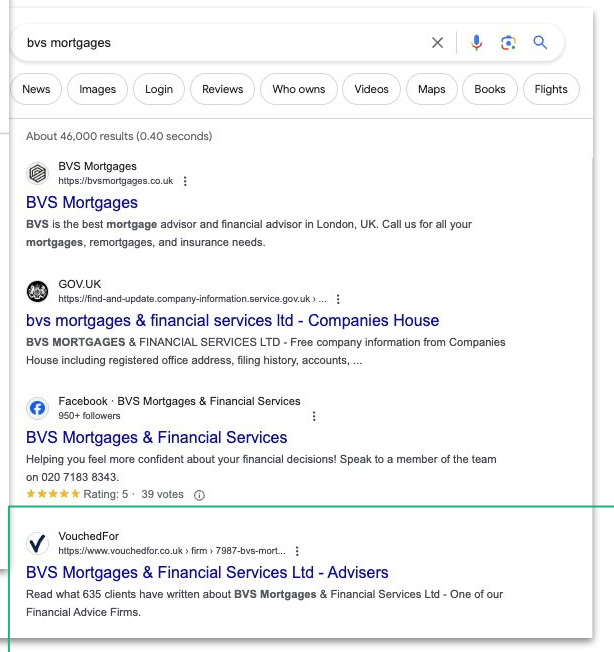
Google search results for "roshan vitharanage". The search bar shows "roshan vitharanage" with a search icon. Below the search bar are tabs for Images, News, Videos, Maps, Books, Flights, and Finance. The results show "About 3,400 results (0.20 seconds)". The first result is from VouchedFor, featuring a profile picture of Roshan Vitharanage and a testimonial: "In my experience as a Financial Adviser for the past five years & Financial Accountant for past 7 years, I see the importance of understanding specific ...". Below this is a LinkedIn result for Roshan Vitharanage, Managing Director of BVS Mortgages, with a testimonial: "In my experience as a Financial Adviser for the past five years & Financial Accountant for past 7 years, I see the importance of understanding specific ...".

Google search results for "roshan vitharanage".

About 3,400 results (0.20 seconds)

VouchedFor
https://www.vouchedfor.co.uk › colindale › 036069-ro...
Roshan Vitharanage, Financial Adviser in London
In my experience as a Financial Adviser for the past five years & Financial Accountant for past 7 years, I see the importance of understanding specific ...

LinkedIn · Roshan Vitharanage
680+ followers
Roshan Vitharanage - Managing Director - BVS Mortgages ...
In my experience as a Financial Adviser for the past five years & Financial Accountant for past 7 years, I see the importance of understanding specific ...



Google search results for "bvs mortgages". The search bar shows "bvs mortgages" with a search icon. Below the search bar are tabs for News, Images, Login, Reviews, Who owns, Videos, Maps, Books, and Flights. The results show "About 46,000 results (0.40 seconds)". The first result is from BVS Mortgages, with a testimonial: "BVS is the best mortgage advisor and financial advisor in London, UK. Call us for all your mortgages, remortgages, and insurance needs." Below this is a GOV.UK result for "bvs mortgages & financial services ltd - Companies House". Below that is a Facebook result for "BVS Mortgages & Financial Services" with a rating of 5 stars and 39 votes. The final result is from VouchedFor, featuring a testimonial: "Read what 635 clients have written about BVS Mortgages & Financial Services Ltd - One of our Financial Advice Firms." This result is highlighted with a green border.

Google search results for "bvs mortgages".

About 46,000 results (0.40 seconds)

BVS Mortgages
https://bvsmortgages.co.uk
BVS Mortgages
BVS is the best mortgage advisor and financial advisor in London, UK. Call us for all your mortgages, remortgages, and insurance needs.

GOV.UK
https://find-and-update.company-information.service.gov.uk › ...
bvs mortgages & financial services ltd - Companies House
BVS MORTGAGES & FINANCIAL SERVICES LTD - Free company information from Companies House including registered office address, filing history, accounts, ...

Facebook · BVS Mortgages & Financial Services
950+ followers
BVS Mortgages & Financial Services
Helping you feel more confident about your financial decisions! Speak to a member of the team on 020 7183 8343.
★★★★★ Rating: 5 · 39 votes

VouchedFor
https://www.vouchedfor.co.uk › firm › 7987-bvs-mort...
BVS Mortgages & Financial Services Ltd - Advisers
Read what 635 clients have written about BVS Mortgages & Financial Services Ltd - One of our Financial Advice Firms.

and his Top Rated Adviser achievement helps him build trust



Top Rated Adviser
certificate

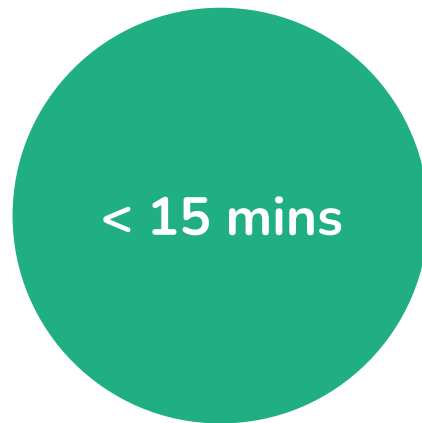


Top Rated Adviser
email signature

Which reduces time spent converting prospects by 75%



Onboarding time
before VouchedFor



Onboarding time
with VouchedFor

Client referrals are the best way to grow, but the funnel has many drop off points

The problem

95% of clients say they'd recommend. Only 26% regularly do.

Asking clients for referrals drives 2x the volume. Yet only 13% of wealth clients have been asked.

88% of clients research a recommended adviser before making contact. Only 10% get in contact.

53% of clients who leave a 5* initial rating convert. This drops to 14% at 4*. Yet most firms don't really know what happens in initial meetings.



How we help

Elevation reveals key actions to turn clients into passionate advocates. VouchedFor public reviews make 85% of advisers try harder.

Elevation highlights which clients to ask for referrals. Also, VouchedFor reviews make 83% of clients more likely to recommend.

1 in 3 of all our members' new clients read and were influenced by their VouchedFor reviews. Adviser-level SEO is key here.

Elevation offers powerful insights to help turn more prospects into clients. VouchedFor reviews/tools build trust and first impression reviews make advisers try harder.



Recap

How to qualify for the Top Rated Guide



- ✓ Receive 10+ client reviews in 2024
- ✓ Achieve an average rating of 4.5 stars in 2024
- ✓ Achieve an all-time average rating of 4.5 stars
- ✓ Fully verified by VouchedFor and pass all checks



- ✓ Invite 100% of clients to leave feedback in 2024
- ✓ Achieve a minimum response rate of 20%
- ✓ Achieve an average firm rating of 4.7 stars
- ✓ Surpass average benchmark for passionate advocacy (20% for FAs, 50% for MAs and PAs)
- ✓ Surpass average benchmark for clients showing no markers of risk (75%)

How to qualify for the Top Rated Guide



VISIT

[GUIDE.VOUCHEDFOR.CO.UK](https://guide.vouchedfor.co.uk)

TO REGISTER

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Top tips checklist

- ✓ TODAY: speak to the team to see how close you are to qualifying for the Guide
- ✓ TODAY: claim your free firm profile
- ✓ JANUARY: look out for info on award categories to see if you're shortlisted
- ✓ JANUARY: use the 'value of advice' video to engage clients
- ✓ MARCH: update your comms with your Top Rated rep tools, and share the Times' Guide
- ✓ APRIL: get further exposure in the regional Guide
- ✓ JUNE: celebrate again with the Telegraph Guide

Questions?

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Thank you

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phil@theyardstickagency.co.uk

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