

## Fiscal Engineers once again named among financial planning elite

- *Firm retains place in prestigious New Model Adviser Top 100 list*
- *Recognition underlines efforts to maintain client-centricity during pandemic*

One of the cornerstones of our philosophy at Fiscal Engineers is that it is not enough merely to understand our clients' *wealth*. We also need to understand our clients' *wellbeing*.

This is why we repeatedly stress that our relationship is with you, not with your money. It is also why we constantly strive to develop relationships that will last for a lifetime.

Maintaining such relationships has been a vital challenge for us throughout the COVID-19 pandemic – and our efforts in this regard have now received official recognition.

Fiscal Engineers was recently named among the leading financial planners in the UK, featuring in the prestigious *New Model Adviser* Top 100 for the ninth consecutive year.

The list is compiled from an in-depth analysis of firms' day-to-day operations, with factors such as staff qualifications and robustness of investment processes taken into account.

Other aspects considered include use of technology, sharing of best practice, recruitment, contributions to professional standards and – crucially – excellence of client service.

As you know, amid the “new normals” that have emerged since March last year, we have taken significant steps to respond to the advent of remote working and greater online interaction.

Innovations include our secure client portal, our mobile app and increased use of cloud IT systems. We hope you will agree that, as a result, our service to you has been enhanced.

“It’s especially satisfying to have maintained our presence in the *New Model Adviser* Top 100 list in the face of the pandemic,” says founder and Executive Chairman Shane Mullins.

“We’ve now got numerous novel means of communicating with clients and keeping them fully informed, and we know these can be highly effective both now and over the long term.

“As I said earlier this year, we’re proud that we’ve been able to sustain and even expand our commitment to client-centricity during a period of unprecedented upheaval.

“But that doesn’t mean abandoning the ‘old’ ways and the human touch, which are still key to making us an extended family that thrives on a real sense of community and belonging.”

Fiscal Engineers has won dozens of awards for financial services and innovation since its founding in 2000, including being named New Model Adviser of the Year on three occasions.

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The team at Fiscal Engineers