

# EDUCATION AWARD PROFESSIONAL ADVISER - BAILLIE GIFFORD

Professional Adviser 2009  
awards

## WINNER

## VERUS CHARTERED FINANCIAL PLANNERS

**F**or Verus Chartered Financial Planners, winning the *Professional Adviser/Baillie Gifford Financial Education Award* was a huge achievement, meaning their hard work in this area had been recognised.

The company's entry was specifically in connection with their accredited CPD courses for dentists - they currently have four accredited centres in Edinburgh, Aberdeen, Dundee and Glasgow.

Jonathon Gibson, director at Verus Chartered Financial Planners, who has developed a specialism for financial planning for dentists, and was primarily involved in the work which won the company the award, explains there are a number of factors that differentiate this project from that of the firm's peers.

"The fact the courses are properly structured with learning objectives and outcomes and the fact we collaborate with other relevant bodies help make the courses different from others," he says



Paul Lothian and Jonathan Gibson, principals of Verus Chartered Financial Planners are presented with the *Professional Adviser / Baillie Gifford Financial Education Award* by Ken Edwards marketing director Baillie Gifford

"For example we run whole day seminars on financial planning where we invite a chartered accountant to speak on tax, or a solicitor to talk on legal issues. For some of the investment issues we usually involve a fund manager to give their views and opinions."

Bringing in relevant and appropriate professionals to help deliver the seminars, has helped make the courses more unique, he says.

"The fact we are collaborating with trade bodies and other

professionals, have a proper teaching schedule with learning outcomes, are targeting a niche market and have NHS accreditation differentiates Verus run seminars," he claims.

Looking towards the future, director Paul Lothian, says the company will be running seminars at the four centres in Scotland again this year and expects this to be an on-going event.

"We will be looking to develop and expand this to other medical fields such as GPs as we see this as the way forward," he says.

### NOMINEES:

**WINNER -**  
**VERUS CHARTERED**  
**FINANCIAL PLANNERS,**  
**DUNDEE**

**HIGHLY COMMENDED -**  
**ARCH FINANCIAL**  
**PLANNING**  
**CRANLEIGH, SURREY**

**NAVIGATOR FINANCIAL**  
**PLANNING**  
**CO DOWN, EIRE**

**LOWES FINANCIAL**  
**MANAGEMENT**  
**NEWCASTLE UPON TYNE**

# JUDGES

## FINANCIAL EDUCATION AWARD JUDGES OF THE PROFESSIONAL ADVISER BAILLIE GIFFORD FINANCIAL EDUCATION AWARD

**NICK CANN**  
CHIEF EXECUTIVE  
IFP



**LAWRENCE GOSLING**  
EDITORIAL DIRECTOR  
INCISIVE MEDIA



**MONA PATEL**  
HEAD OF COMMUNICATIONS  
IMA



**KEN EDWARDS**  
MARKETING DIRECTOR  
BAILLIE GIFFORD



**ROB KINGSBURY**  
EDITOR  
PROFESSIONAL ADVISER



**WENDY VAN DEN HENDE**  
CHIEF EXECUTIVE  
PFEF



### THE JUDGING CRITERIA

Each entry was considered on the basis of:

1. The quality of the programmes and initiatives the adviser/firm has undertaken to improve the investment knowledge of their clients and/or the general public.

2. The quality of the initiatives each entrant has in place to build and progress these initiatives in 2008 and beyond.

The entries and supporting evidence were analysed on the following basis:

- Initiatives and programmes undertaken in the last 12 months to improve financial and investment knowledge of clients
- Quality of supporting materials and evidence
- Proposed programmes to build financial education initiatives in the future
- Judges discretion on the overall quality of the entry