

## **PAUL LOTHIAN OF VERUS WEALTH SCOOPS '2013 INDUSTRY PERSONALITY' AT WIDOWS AWARDS**

Scottish Widows has announced Dundee businessman Paul Lothian as the winner of the coveted 'Industry Personality of the Year' award at its annual intermediary awards, "*The Widows*".

Paul was hailed the winner at the awards ceremony in London on Friday 11<sup>th</sup> October, which was jointly hosted by Scottish Widows Chief Executive, Toby Strauss and Simon Callow CBE, the renowned actor, writer, musician and theatre director. Now in their eighth year, The Widows are independently assessed to celebrate outstanding achievement by intermediaries in the life, pensions & investments markets.

The co-founder of Dundee-based chartered financial planning firm – Verus Wealth – Paul was hailed for being 'one of the most highly-qualified financial advisers in the UK', with over 20 years' experience as an independent financial adviser. He was also commended for being among the first to attain the CII's Chartered Financial Planner status at the title's introduction in 2005.

Further career highlights cited on the night included Paul being elected to the board of the Personal Finance Society in 2006 and serving as President in 2009, before stepping down in 2011.

Speaking on his win, Paul Lothian said: "I am truly honoured to receive one of the highly sought-after *Widows* and to be recognised for my modest contribution to the financial services industry over the past 20 years. ."

Toby Strauss, Chief Executive, Scottish Widows, said: "Congratulations to Paul for his well deserved win which clearly shows his dedication to the industry. These awards recognise the contribution of the intermediary community to providing a comfortable future for consumers. In their 8th year, the nominations still give the judges a difficult time with many excellent candidates demonstrating innovation, customer focus and all that is positive about the industry. Congratulations to all of this year's winners and my thanks to the judges for their time and significant effort."



The other coveted bronze statues of the iconic widow were awarded to:

- Industry Initiative of the Year – Pete Matthews, Jacksons Wealth
- IFA Newcomer – Sarah Stone, Harbour Financial
- Exceptional Contribution Award – Len Warwick (posthumous)

*(Winner biogs included in 'Notes to Editors')*

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**For further information please contact**

Alison Robb  
Media Relations  
Scottish Widows  
0131 655 6252  
07795 454013  
[alison.robbs@lloydsbanking.com](mailto:alison.robbs@lloydsbanking.com)

#### **Notes to editors:**

In picking the winners, the judges said;

#### **Industry Personality of the Year – Paul Lothian, Verus Wealth**

Paul Lothian is one of the most highly-qualified financial advisers in the UK and the co-founder of two chartered financial planning firms – Verus Wealth and AAB Wealth. Paul has over 20 years' experience as an independent financial adviser and he was among the first to attain the CII's Chartered Financial Planner status at the title's introduction in 2005. Elected to the board of the Personal Finance Society in 2006, he served as President in 2009, before stepping down in 2011. His vision created the Scottish Conference for Chartered Financial Planners in 2012 and he is a regular contributor to the financial press and industry conferences.

#### **Exceptional Contribution Award – Len Warwick (posthumous)**

In place of the Lifetime Achievement Award category this year the judges decided to honour Len Warwick with an Exceptional Contribution Award in recognition of his overwhelming contribution to financial services. Len passed away earlier this year and is a previous winner of the Lifetime Achievement Award. One of the most respected and influential IFAs in the UK Len Warwick was a founding member of the Association of IFAs, and his reputation for reasoned argument and his commitment to professionalism were legendary. He also enjoyed life to the full outside of the boardroom. He loved spending time with his family, and doted on his grandchildren. In attendance on the night were two of Len's children, Richard and Bernadette Warwick.

#### **Industry Initiative of the Year – Pete Matthews, Jacksons Wealth**

Pete Matthews has shown his dedication to the industry, and has done a huge amount to move the industry forward and bring us closer to our customers. He created meaningfulmoney.tv - a collection of videos to provide simple, accessible financial planning information to the public at large and a revelation in the industry. His latest venture, Advisertech has just gone live. This site will share best practice for online marketing and social media, from the unique perspective of a financial adviser.

**IFA Newcomer - Sarah Stone, Harbour Financial**

Sarah originally decided not to follow her father's footsteps into financial advising, however, she soon realised that it was her calling. She graduated from the Sesame Financial Adviser School, and now works for Harbour Financial advising on mortgages and insurance. She also uses social media to encourage more graduates to join the profession, and has started to gain a presence in the trade press.

**Widows Awards judging panel:**

**Keith Richards** has over 30 years' experience within financial services. As a respected industry commentator, he is actively engaged in the promotion of financial services within the UK and has contributed to the boards of both AIFA and AMI. Keith was appointed Chief Executive of the Personal Finance Society in May 2013, combining his intermediary background and extensive knowledge and experience of the marketplace to ensure that the PFS remains the professional body of choice.

**Kim North** is the managing director of Technology and Technical and has worked in financial services for over 31 years, now working as a consultant for over 120 companies. She created the Pretty Technical Partnership, a financial services consultancy and Pretty Financial, a London City based IFA. She's a columnist for Money Marketing, and an industry judge for Corporate Adviser, Money Marketing and Incisive Media.

**Mark Polson** is the founder of the lang cat, a specialist platforms and pensions consultancy. The lang cat works with IFAs and providers to help them develop new propositions, turn marketing strategy into action and articulate their services in such a way that people without financial services degrees have a hope of understanding them. Bit by bit, it aims to make the industry just a little less corporate and stuffy and a little more human. Mark is a prolific writer, contributor to the trade press and public speaker, even when people ask him not to be.

**Simoney Kiriakou** graduated with a Masters in Old English. In 1999, she cut her teeth by joining Pensions World. She then became deputy editor for Planned Savings, before moving to the FT Group. There she worked as an investment reporter for the combined Financial Adviser and Investment Adviser news desk. When the desks split, she created the Investment Adviser news desk and ran that as news editor for three years until she left in 2006 to become editor of the Securities & Investment Review. After four years of editing financial titles for a London agency, she returned to Financial Adviser as news editor.