





INTRODUCING OUR SUCCESSION PLAN: THE FUTURE OF NICHE

Ever since our founder, Ray Adams, became an Independent Financial Adviser he has strived to provide an outstanding service to those who matter the most – our clients. And for over 14 years, the Niche brand has grown to become synonymous with high quality independent financial advice.

But for those of you who didn't know, the last 18 months has also seen Ray's family grow. The addition of a son-in-law and daughter-in-law, plus the arrival of 2 grandchildren has placed a degree of perspective on what truly matters most.

Which is why we today introduce you to the Niche Succession Plan. Throughout the past year, Ray and the ever-growing team have been putting plans together for the future of Niche. An exciting future which includes everyone.

This means over the coming months, you'll start to notice some changes. Ray will split his time more evenly between family and business, a board of directors will be created to oversee the running of the company, and an employee-owned business model will be implemented.

This means all our advisers and staff at Niche will possess shareholding in the company. Everyone will have a say in how we continue to implement Ray's ambition to provide an outstanding service to those who matter the most. And everyone will receive a share in the profits.

The business and day-to-day operations will be led by the newly created board of directors. This will consist of Matt Wiltshire (Managing Director), Tom Roberts (Compliance Director) and Aled Phillips



“You’ll still have the same team of advisers and support staff going above and beyond to provide you with an outstanding service, ensuring you always receive the highest-quality financial advice.”

- Ray Adams, Chairman



Tom Roberts
Compliance Director



Matt Wiltshire
Managing Director



Aled Phillips
Operations Director

(Operations Director), with Ray taking the role of Chairman.

Both Matt and Tom have been a part of Niche for 9 and 11 years respectively, developing under Ray to become senior members of the leadership team. Aled is a fully qualified Chartered Financial Planner and a recent addition, bringing with him a wealth of industry knowledge.

So what does this mean for you?

Not much is the answer! The day-to-day servicing of your financial plans and strategies will transition from the privately-owned Niche Independent Financial Advisers Ltd to the employee-owned Niche Sport and Finance Ltd. The transition will happen over the coming weeks and you may receive correspondence from your provider companies confirming the change.

You'll still have the same team of advisers and support staff going above and beyond

to provide you with an outstanding service, ensuring you always receive the highest-quality financial advice. And now more than ever before, it will be a team putting their hearts into a business which they are a part of.

If you have any questions at all regarding the Niche Succession Plan, please do not hesitate to get in touch. We are here to help clarify anything you maybe unsure about and enlighten you to what is an exciting future for Niche clients and employees alike.

CONTACT US

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Privacy Notice – General Data Protection Regulation (GDPR)

Niche Sport And Finance Limited (“Niche Sport”) purchased the financial planning business of Niche Independent Financial Advisers Limited (“Niche IFA”) on 1st January 2019. We note that you are currently listed on Niche IFA’s client database for the purpose of receiving financial planning services from Niche IFA. Your personal data has been transferred to Niche Sport for the continued provision of the financial planning services. Niche Sport will process your personal data fairly and lawfully and in accordance with the principles and requirements of the GDPR. Under the GDPR, we are required to provide you with certain information about who we are, how we process your personal data and for what purposes and your rights in relation to your personal data. This information is provided in our Privacy Notice document (www.nicheifa.co.uk).

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