

Group Profile

The Ideas Exchange (IX) is a prestigious association consisting of over 50 business owners and decision-makers from financial planning firms. These firms target and serve the more complex client community, most notably High Net Worth individuals.

Membership Benefits

The combined membership of IX is a rich seam of business acumen and life experience. Membership provides each individual member with a broader platform of knowledge and support than could be derived solely from their own business experiences.

Continuous Improvement

All members share a common desire for continuous self-improvement. They hold monthly meetings to share new ideas, skills, and information. Meetings are structured, topical, and purposeful, featuring influential guest speakers with diverse expertise in high-quality advice based on robust practices.

Professional Excellence

IX members are committed to staying at the top of their game, both personally and professionally. In search of such excellence, Service Suppliers are held to the highest standards. This mindset enables them to provide the very best advisory and information services to their clients.

Regulatory Compliance

The vast majority of members are independently registered with the FCA and use the disciplines of new model advisers, including networking, use of third-party services, referrals, WRAPs, platforms, diagnostic and reporting programs.

Industry Influence

The group share experiences and influence each other in what services they should use and avoid. The information shared is far reaching. Outside of The Ideas Exchange, members belong to other financial groups, speak at conferences, act on regulatory bodies, hold and arrange seminars, deliver Ted Talks and host podcasts; via each they share their knowledge and truly influencing the wider industry

Qualifications

The professional calibre of IX members is high. All have achieved the highest levels of personal qualification within their respective industries. The majority are either Chartered Financial Planners or Certified Financial Planners. Many businesses owned or represented by members are Chartered, meaning all employees are professionally qualified.

Affiliation Discounts

Whilst we are a group of independent firms, we all seek to leverage the best technologies and tools for our clients. To that end, it is not uncommon that many of our members will engage with the same market leading suppliers or specialists. These suppliers can benefit from this greater exposure to leading firms, excellent peer review, beta testing and feedback from our members. For that reason, it is not uncommon that in some cases these suppliers will offer us favourable collective terms. However, we wish to make clear that the decision to use any supplier is taken by each firm independently and based on the quality of their offering.

IX Group Statistics

In total, the members and companies in The Ideas Exchange:

- Employ over 200 financial planners and investment advisers
- Employ over 340 support staff
- Have a turnover in excess of £78m per annum
- Have assets under administration in excess of £10.5bn
- Have won 83 business awards
- Include 4 former winners of "IFA of the year"
- Have 10 people on industry 'key influencer' lists
- Have 7 holders of positions on professional bodies
- Include several published financial authors

Contact Information

For more information, visit <http://www.ideas-exchange.co.uk>

IX Member Firms

Altor	Engage Financial Services	Phoenix Wealth Mgmt Limited
Altyx Financial Planning Ltd	Eva Wealth	Sancus Retirement Planning
Anand Financial Architecture	Evans Hart Limited	Secure Asset Funds Europe
Arcrate	First Wealth	Serenity Financial Planning
Astute Financial Management	ilumiti	SK Financial
Atomos Wealth	Jarrovia Wealth	Sky Blue Wealth Management
Berry & Oak	John Joseph Fincl. Services	Strategic Wealth Partners
Buckingham Gate	KMD Private Wealth Mgmt	Templar Financial Planning Ltd
Capital Asset Management	Life Matters	The Private Office
Carrington Wealth Mgmt	Lockhart Capital Management	The Progeny Group
Cavendish Ware	Longhurst Limited	Values to Vision FP Ltd
Citywide Financial Partners	Maven Adviser Limited	Wealth Matters
Comet Wealth	Monenti Partners	Wilcocks & Wilcocks
Emery Little Wealth Mgmt	Paradigm Norton	W1M Wealth Management
		Yellow Capital Wealth Mgmt