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We are promising to: Help you become happier in your work. Be more successful in what you do. Have a better work life balance. Our adviser's happiness is what separates us from our competitors. We offer a service which enables our advisers to retain their independence with their clients, but takes away a lot of the repetitive regulatory administration and provides you with the resources you need to develop your client network and work life balance.

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Why the Happy Financial Adviser? Happy Financial Advisers

Launched in 2017 the book has also gone onto receive many 5 star reviews. The book focuses on embracing happiness in order to achieve greater success for financial advisers and their clients. Advisers are encouraged to connect with more people, have the freedom to be themselves and make a positive difference. Author, Andrew Goodwin, who is the Managing Director at Financial Services company, Truly Independent, said: "As you might expect I'm very 'happy' about the success of the book.

'The Happy Financial Adviser' becomes an Amazon #1 ...

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About The Happy Financial Adviser Score. The Happy Financial Adviser scorecard measures

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your current business position against our benchmarked IFA lifestyle business AND identifies areas requiring action to ensure you have a more financially rewarding and happier lifestyle business. At Truly Independent Ltd, we recognise that when our advisers are happy in their work, they are more productive and their clients are happier too!

The Happy Financial Advisers - Scorecard
“The Happy Advisor is a tool that all financial professionals must have in their arsenal. Bill Smith is a master storyteller and jumps inside the heads of those who are on the firing line every day.

The Happy Advisor: Bill Smith
The financial adviser happiness test will only take around 10 minutes and is just a series of yes/no questions and answers. The scorecard aims to measure your current business position against our bench marked IFA lifestyle business and identify areas which could help you have a more financially rewarding and happier lifestyle.

IFA Happiness Test - Scorecard - Happy Financial Advisers
Learn HOW to deliver great lifestyle

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A financial adviser will ask you lots of personal questions about your financial plans and personal circumstances so that they can recommend the most suitable products for you; check that your personal information is kept confidential, and find out whether it is used

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1. Figure out what you need. If you need retirement advice, it might be best to go for an adviser who specialises in pensions. If you need a complete financial plan, go for an adviser who offers the whole package rather than just focusing on, say, investment advice. 2.

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