

Welcome to Impact Financial Services

Joining our firm means becoming part of a team committed to providing professional, responsible and client-focused financial advice.

We believe that good advisers are not only knowledgeable about financial products, but also understand the responsibility that comes with advising clients about important financial decisions.

Our goal is to build a firm where advisers can develop their careers while delivering advice that genuinely helps people protect their financial future.

1 OUR MISSION

At Impact Financial Services our mission is to positively influence the lives of both our advisers and our clients.

We aim to achieve this by:

- providing high-quality financial advice
- supporting adviser development
- building long-term relationships with clients

Our success as a firm depends on the success and professionalism of our advisers.

2 YOUR ROLE AS AN ADVISER

As an adviser you play an important role in helping clients make informed financial decisions.

This includes:

- understanding the client's situation and priorities
- explaining financial solutions clearly
- recommending suitable products

Advisers are trusted to act with professionalism and integrity when working with clients.

3 OUR ADVICE PHILOSOPHY

At Impact Financial Services we believe that advice should always come before the product.



By following this approach advisers help ensure that clients receive advice that is appropriate for their circumstances.

4 DEVELOPMENT AND SUPPORT

We are committed to supporting advisers throughout their professional journey.

Advisers at Impact Financial Services have access to:

- Impact Academy learning platform
- Adviser Development Academy (ADA) sessions
- mentoring and guidance from experienced advisers

These resources help advisers build both knowledge and confidence.



5 PROFESSIONAL STANDARDS

We expect all advisers to maintain high professional standards when working with clients.

This includes:

- acting with integrity
- communicating clearly
- maintaining accurate records
- following firm procedures

Strong professional standards help protect both the client and the adviser.

6 WORKING TOGETHER

Impact Financial Services is built on collaboration and knowledge sharing.

Advisers are encouraged to:

- support each other
- share experiences and insights
- contribute to the development of the team

A strong team environment helps everyone grow professionally.

7 YOUR JOURNEY STARTS HERE

Joining Impact Financial Services is the beginning of a professional journey.

During your time with the firm you will:

- develop your knowledge and skills
- gain experience working with clients
- build long-term relationships within the industry

We look forward to supporting you on this journey.

Welcome to Impact Financial Services.



Responsible Advice

Putting clients at the centre of everything we do



Continuous Learning

Growing knowledge and skills throughout your career



Collaboration

Supporting each other and sharing expertise



Professional Excellence

Maintaining the highest standards of advice

DOCUMENT CONTROL

Owner: Training & Competence

Version: 1.0

Classification: Internal

