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NEWS RELEASE

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Just Group unveils winners of the second Vulnerable Customer Awards

- Unique awards showcase adviser excellence in supporting their vulnerable customers
- Second edition raises bar even higher in pursuit of firms and individuals going above and beyond with their initiatives, culture, values and ways of doing business

The **Just Group 2022 Vulnerable Customer Awards** recognise and celebrate the achievements of financial intermediary firms excelling in supporting their customers experiencing vulnerability.

The awards honour the firms and individuals striving to ensure customers, whose personal circumstances make them more susceptible to harm, are not disadvantaged and receive good outcomes.

Entries were submitted in the categories with the winners selected by a panel of independent judges highly regarded for their expertise in the fields of vulnerability, financial advice, regulatory compliance and customer service.

“This is the second year of our unique awards celebrating the achievements and excellence of the advisory industry in their treatment of vulnerable customers, and once again the awards attracted some really exceptional entries,” said **Stephen Lowe, group communications director at retirement specialist Just Group**.

“The judging panel was impressed by the support advisers are putting in place to identify, treat and support clients showing characteristics of vulnerability. We congratulate all the winners, those who came highly commended and all other entrants.”

The categories and winners – extra quotes from judges on why each entrant won in Notes to Editors

VULNERABLE CUSTOMER CHAMPION

For individuals who have gone the extra mile to mobilise the consumer vulnerability agenda in their firm.

Winner: Adam Johnson, Director and Financial Adviser at New Forest Wealth Management

Highly commended: Richard Higgs, Independent Financial Adviser at Harold Stephens; Daniel Watts, Chartered Financial Planner at Watson Moore Independent Financial Advisers Limited.

UP CLOSE AND PERSONAL

Recognises excellent support for clients who have been or are vulnerable

Winner: James Barnett, Chartered Financial Planner at James Barnett Wealth Management

Highly commended: Dennis Perry, Equity Release Specialist at South West Equity Release; John Chapman, Equity Release Adviser at Equity Release Associates.

COMPANY OF THE YEAR – Up to 5 advisers

Marks outstanding progress within individual firms.

Winner: Harold Stephens

Highly commended: Oakmere Wealth Management.

COMPANY OF THE YEAR – 6-19 advisers

Marks outstanding progress within individual firms.

Winner: Pensionhelp Limited

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Highly commended: Clear Cut Financial Planning; Financial Management Bureau Limited.

COMPANY OF THE YEAR – 20+ advisers

Marks outstanding progress within individual firms.

Winner: M&G Wealth Advice

Highly commended: Alzheimer's Society, Santander UK.

Just Group would like to extend its thanks to the **judging panel:**

- Tish Hanifan, Founder and Joint Chair of SOLLA;
- Chris Fitch, Research Fellow at the University of Bristol and Vulnerability Lead at the Money Advice Trust;
- Sally Plant, Head of Financial Planning at CISI;
- Keith Richards Chair of the Financial Vulnerability Taskforce and ex CEO of the PFS;
- John Somerville, Head of Financial Services at The London Institute of Banking & Finance;
- Johnny Timpson, the Prime Minister's Champion Group Member for Dementia Communities;
- Jenny Cadman, Head of Customer Experience at Just Group.

For further details on the awards please visit: <https://www.justadviser.com/business-services/just-group-vulnerable-customer-awards/results/>

More than 13,000 intermediaries and support staff have now used the Just Consumer Vulnerability in Later Life online training module, identified by the Financial Conduct Authority (FCA) as an example of good practice.

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Notes to Editors:

Further detail on the winning entries

VULNERABLE CUSTOMER CHAMPION: Winner – Adam Johnson, New Forest Wealth Management

Keith Richards: “Adam’s focus on Vulnerable Consumers in Financial Services has unquestionably heightened his awareness, focus and actions towards his clients and promotion within his firm.”

Tish Hanifan: “His ‘drive’ comes through in this entry.”

UP CLOSE AND PERSONAL: Winner – James Barnett, Chartered Financial Planner at James Barnett Wealth Management

Jenny Cadman: “Above and beyond. The support provided – visits, finding a care home, hearing aids, the paperwork, the ongoing contact...feels like family.”

Johnny Timpson, OBE: “Recognised the vulnerability and built an ongoing relationship.”

COMPANY OF THE YEAR – up to 5 advisers: Winner – Harold Stephens

Sally Plant: “Training and policies are excellent, with the Director leading both of these. Strong sense of wanting to continue to improve by sharing best practice with other firms.”

Chris Fitch: “Provided a higher number of examples of positive interventions.”

COMPANY OF THE YEAR – 6-19 advisers: Winner - Pensionhelp

John Somerville: “A clear culture of vulnerable customer care in everything they are doing throughout their processes. It is clear that this culture was the foundation of the company when formed and has been continually developed with several outstanding examples both internally and externally in this field.”

COMPANY OF THE YEAR – more than 20 advisers: Winner – M&G Wealth Advice

Tish Hanifan: “They have clearly not only changed their systems to optimise the opportunity to identify and support clients with additional support needs but have importantly developed an internal training programme. The entry indicates that there is an empathic ethos within the organisation.”

Keith Richards: “The only firm to demonstrate fresh thinking towards every client’s vulnerable circumstances, rather than an evident disability or age-related profile.”

About Just

Just (Just Group plc) is a FTSE-listed specialist UK financial services company.

A leader in the individual retirement income, care and defined benefit de-risking markets, Just has been trusted to manage around £23 billion of customers’ retirement savings and has helped customers release more than £6 billion from their properties.

Just provides the following wide range of products, advice and professional services to individual customers, financial intermediaries, corporate clients and pension scheme trustees:

Marketed Products

- De-risking solutions for pension scheme trustees who want to remove the financial uncertainty of operating defined benefit pension schemes;
- Individually underwritten retirement income products delivering a guaranteed income for life;
- Long term care plans that provide those people moving into residential care with peace of mind by knowing a regular payment will be made to the care provider for the rest of their life;
- Lifetime mortgages for people who want to safely release some of the value from their home.

Professional services

- Regulated financial advice and guidance services for individuals wanting help in using their pension savings and/or releasing some of the value from their home; and
- A range of business services tailored for our corporate clients, ranging from consultancy and software development to fully outsourced customer service delivery and marketing services.

The companies within Just Group are authorised and regulated in the United Kingdom by the Financial Conduct Authority and / or the Prudential Regulation Authority.

