



BRAND VISION 2024
PICTURE THIS: THE FUTURE IN FOCUS

It's 2024.

What a journey it's been over the last three years. We've seen incredible growth, exciting change and a whole host of new faces joining our team. Our innovative financial solutions are now benefitting 220 medical professionals and their families – that's double the number of clients we had in 2021. And we've seen our turnover rise to £700,000. We're proud to have built a future-focused business that's helping people get the most out of life – and we know the best is yet to come.

EMBRACING CHANGE

When we set up Med-Ex back in 1998, it was with one real aim. To provide a service that reviewed our clients' financial products, checked if they were performing well – and if they worked hand-in-hand with their future plans. That's something we still do. But today the focus is much more on a coordinated plan that can help our clients get a good return on life, rather than just on their investments.

Over the years, our business has grown and thrived. We've been lucky that new people have come to us after hearing good things from friends and family. That's always the way we like to win new business. It's also heartening to see our clients' children grow up and become investors in their own right. Being able to work with a family through the generations – well, it doesn't really get much better than that.

We never stand still for long. We're always searching for new ways to work better and do even more to help our clients. Like the way we've moved to cloud-based technology for document storage through Wealthcraft, continued to develop Med-Ex Kinder World Model Portfolios, our Environmental, Social and Governance (ESG) investment portfolio that has become a favourite with clients. Or the way we've embraced the virtual experience for meetings and made it work so well.

We're incredibly proud of what we've achieved over the last three years, especially as there have been some monumental challenges along the way! But now we're ready to power into the future, taking our clients and our expert team with us.



WHAT WE STAND FOR

Expert

After nearly 25 years in the business, you'd expect us to know our stuff. But the thing about Med-Ex is, we never stop learning. With every new addition to the team our knowledge grows – and we're continually looking for ways to embrace technology and improve how we work.

We're definitely a glass half full type of business. There may be obstacles for our clients to overcome. But we enjoy the challenge and always manage to find a way around them. It's probably the part of our job that we get the most satisfaction from.

Optimistic

Ethical

Everything we do is with people and the planet in mind. We help our clients get the most out of their investments (and life), but always with one eye on the impact that's having on the Earth. And with Med-Ex Kinder World, our popular ESG offering, we can put that approach into practice.



OUR VALUES

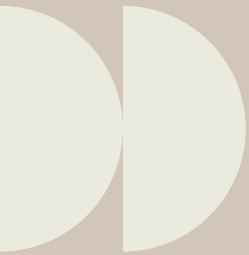
These are central to everything we do. They're our guiding principles – our rulebook for how we want to work. And perhaps more than anything, they're our reminder that it's always possible to do a little bit more.



Go the extra mile

We go further, we nudge, remind and support our clients to do what they want to do. And we deliver. Every time.

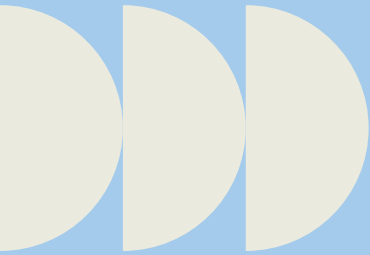
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Inspire confidence

We want our clients to be delighted by what we do for them. And to know they've put their trust in the right hands. Every time.

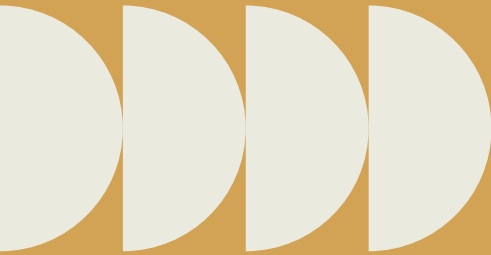
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Rise to the challenge

We're not afraid of obstacles or challenges that come our way. They're what help us think creatively and find the best solutions. Every time.

3



Share ideas

Innovation and experiences make the world go around. So when we make discoveries or have brilliant ideas, we're happy to share them so others can benefit. Every time.

4



Embrace the future

We never shy away from exploring new solutions or trying out the latest technology. We owe it to our clients to keep learning and moving forward. Every time.

5





BEING A CLIENT

We work with a wide range of professionals, but our business has been built on working with NHS doctors, GP's and dentists, and that's not going to change. This is where our specialism lies – and it makes life easier for our clients if we understand their career structures, pay scales and pension schemes.

One thing we're passionate about is being able to deliver advice in a way that's free from jargon and easy to understand. And that's certainly true of the Med-Ex Model Portfolio Service we've developed – portfolios that make investing and rebalancing quick and simple. We don't offer clients a quick fix. More a long-lasting relationship that has their best interests at heart.



BEING PART OF THE TEAM

We know it's the people that make Med-Ex what it is. Without the expertise, dedication and optimism of our team, we wouldn't be anything. And we want to continue attracting the same sort of people to come and work with us. Then as our business grows, we'll have the talent we need to keep our clients happy and ensure our very high standards are upheld.

Once brilliant people join our team, it doesn't stop there. We know how critical it is to keep moving forward, so if they need to develop new skills, sharpen others or adapt to different roles, we'll help them do it. And if professional qualifications are possible, we'll provide all the encouragement and investment it takes to make that happen too. We're ambitious as a business, and we're happy to recognise and reward anyone who can help us deliver results.



WITH YOU THROUGH THICK AND THIN

In our own lives, we've had plenty of challenges, but we still thrive on helping our clients deal with theirs. Births, deaths, job changes, marriages, divorces, home moves, retirements, emigrations, illness – you name it, we've been through it all with our clients. And helped them come out the other side smiling.

We make the magic happen. Whatever clients dream of doing in their life, we're here to show them it's all possible and then get a roadmap in place to reach the final destination. It's also about peace of mind – that there's enough money for clients to do all the things they hope, and enough left at the end to keep loved ones secure too.



INNOVATION IN ACTION

Success can boil down to the simplest things. For us, the ability to change is everything. That's why we listen to what our clients want from life, what service they expect, and how technology should play its part. Then armed with those insights, we change and adapt so we're always giving them what they need.

We're no strangers to technology either. In this new world of fast-changing data access, the introduction of Wealthcraft to manage all our back-office systems and provide an Investor Portal has had far-reaching benefits – both for us and our clients. So whatever the future holds, we'll always be ready to make the most of it.





THE DIFFERENCE WE MAKE

Since Med-Ex first opened its doors in 1998, we've worked with hundreds of families, helping them navigate the twists and turns of life and make the most of their money. We never forget that what we do has a real impact on people. And when we see them achieving something incredible, that's the best feeling ever.

Just as good, is knowing that our Life Plans help clients feel confident about the future. We take away the fear of the unknown, showing them what they want to do is possible, and devising a clear route to achieve it. And sometimes that means they get to do more than they ever thought possible – or do it much sooner than they thought.

We help our people too. We lead by example, showing them anything is possible and encouraging them to build an exciting and rewarding career with us. And of course, we always make sure there's some fun and laughter along the way.

A VISION TO DRIVE US



This is our vision for how we want Med-Ex to look in 2024. It will be our driving force for the future, reminding us who we are, where we're heading and what values we hold dear. It's here to help us continue to build a business that's expert, optimistic and ethical – and one that supports our clients to live life to the full.

This is our Brand Vision 2024. Together we can make magic happen.



FIND OUT MORE

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Risk warning

Past performance is no guide to future performance. The value of investments, and the income from them, can go down as well as up and investors may not get back the amount originally invested.