



Introduction to Mark

Mark is an entrepreneur who found himself with a life changing amount of money following a successful management buyout. Methodical, organised and capable, he interviewed a number of financial organisations before appointing Edison. Since Mark and his wife appointed us, we've helped them with the key decisions they've made about their family's future. After a year building a house and considering his options, Mark is now enjoying a new and exciting business opportunity.

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Mark's Story

“I was part of a management buyout and when the sale happened, my financial position changed substantially. So, I wanted to appoint a wealth manager that could help me and my family plan our future.

I talked to some private banks, but they just seemed to want to dive straight into talking to me about investing money. It felt like they just wanted to 'sign me up', instead of really trying to first understand what future I wanted for me and my family.

Edison approached it so differently. They were focused, but on me first and helping me answer the questions I had about our future and if what we wanted to do was possible. It felt refreshing. Also, because it is their business, they really had some skin in the game, there was no bureaucracy either and they could make decisions quickly and without having to ask for permission from their superiors.

I found Edison really open and straight-forward too. They offered and arranged for me to speak with a couple of their existing clients. That really made Edison stand out and it helped to speak to some people that had already been with them for a while.

Mark's Story (cont.)

They were also exceptionally clear on fees. It all felt so considered and professional. And when we got to the stage of appointing Edison, the action, implementation, follow up and service were excellent. The communication was great too. We always felt like we understood what was going to happen, when and, most importantly, why.

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I remember our discussion about our objectives being very different. Only when we were all clear about those did we even think about the money. And since then, when I've had to make important decisions quickly, Edison have been there to help. You need clarity at the point that you make decisions and that's what I've got from Edison.

The advice that Edison give is always very clear. They cut through everything. They are straight to the point. They have remained resolutely focused on our objectives too. When I've wanted to invest more money because the investments were doing well, very well in fact, Edison have helped to keep me focused too. That means that our investment decisions are driven by our objectives, not by our emotions or by the markets. I think Edison are very different to what else is on the market. I certainly didn't come across anybody that's quite like Edison.”

For a straightforward conversation, call us on 020 7287 2225 or email hello@edisonwm.com.