



Our mission statement

Why are we here?

Atkins Bland is here to help our clients make the most of their financial resources and achieve their financial planning goals. Exactly what this means varies from one client to another, just the same as their personal circumstances and aspirations vary.

For some, getting good results on their invested capital is the acid test. For others, tax planning is the priority.

However, for most, we believe the core priority is to know someone they can trust is there, watching over their finances and keeping them up to date with changes they need to be mindful of.

They want peace of mind, and an expert in a complex field they can turn to whenever they feel the need or the desire.

They want to sleep easy at night, happy in the knowledge that we are there to help them navigate through the challenging world of investment and financial planning.

Why bother using a financial adviser?

Well, perhaps it is best to answer that question by reversing it; ***why NOT have a financial adviser?***

We expect the most common reason people don't use the services of a financial adviser is they think they don't need one. Typical reasons for this are:

- They think a financial adviser is only for those with a lot of money, and don't realise sound financial advice can be pivotal to the security of those without much money, especially in terms of helping to provide protection from the consequences of the ill health or death of a breadwinner
- They believe they already know all they need to about financial and investment planning, so can rely on their own expertise. For some this will certainly be true, but not for many
- They feel they can rely on the internet to obtain the advice they need. That may be correct, as long as they know what questions to ask and fully understand the answers they get. Most people using their own research probably don't
- They think they can't afford it. If using a financial adviser drains your resources rather than enhances them, that may be true, but a good financial adviser should do the opposite. What's more, any financial adviser worth their salt should be happy to allow you to find out if you can afford them without any up-front cost. At Atkins Bland, we certainly do, and we aim to be affordable to all and, most importantly, offer genuinely good value for money.

In our view, nearly everyone needs a good adviser because, without one, there are just too many holes for the unwary to fall down. However, perhaps the real question is why not use a financial adviser?

Even someone with a high degree of expertise in finance, tax and investments should find a second opinion from a professional adviser helpful, especially when making important decisions. For the vast majority of people whose specialist expertise lies elsewhere, it should go beyond just being helpful, and could well be pivotal to their financial wellbeing, either now or in the future.

However, in the world of the Independent Financial Adviser, no two are the same, and there can be vast differences between them. Making the right choice when finding an adviser is just as important as making the decision to seek professional advice in the first place.

Why Atkins Bland?

We think the answer to this is because we're good at what we do. However, we appreciate that we can't expect people to just take our word for that. Our mission is to prove this, in every way we can, to all of our clients.

For those with prior experience of using a financial adviser, far too many have endured a somewhat distant relationship with them, receiving little proactive communication and little engagement, and often wondering what exactly they are paying for. If you are one of these, you will find being a client of Atkins Bland an entirely different experience.

If you have never had a financial adviser before, and have been recommended to us, we hope you have heard enough positive stuff about what we do and how we do it, to have a good idea of "why Atkins Bland". We will do all we can to add new reasons as you gain experience of being one of our clients.

Whether or not you have had a financial adviser in the past, but have stumbled across us somehow, we like to believe you will look back at that with gratitude that fortune smiled on you, and we will do all we can to help that come about.

While we can never promise any specific outcome from our investment or financial advice, just as nobody can, what we can promise is that all our recommendations and advice will be honestly given and carefully considered.

We are meticulous in our research and make all our investment decisions 'in-house'. We do not farm this out to a third party, as is commonplace in the profession these days, usually due to a lack of adequate in-house expertise.

We are always available on the end of a phone or by email, or for a face-to-face/video meeting, to help in any way we can.



We do not come free of charge, but it is our belief that we offer exceptional value for money for the work we do and the services we offer, both in outright terms and when compared with other advice firms. This, we feel, is why we are one of the longest established and most successful financial advisory practices in Dorset, with a history going back more than 35 years and many clients who have been with us for nearly all of that time.

We are a family business, in every sense of the word. Many members of staff have other family members working at the firm and, more importantly, we give advice to families as well as the individuals who make them up. Indeed, we have an ever-increasing number of clients who are not just the children, but the grandchildren of the clients who first came to us.

Most of our clients come by recommendation, but we are always happy to speak to those who have found us, and the fairly unique services we offer, by other means.

So, what is our mission?

Our mission is to apply the highest standard of integrity and attention to detail to achieve the best outcomes for our clients, in every way possible.

It is to engage with our clients, be there for them, and give them peace of mind.

It is to do all we can to help ensure that each and every one of our clients feels better as a result of using our services than they would if they were not, in whatever ways matter to them.

Atkins Bland Ltd. - January 2021



**The value of investments and any income generated will fall as well as rise.
An investor may, therefore, get back less than the amount invested.**

Atkins Bland Ltd is authorised and regulated by the Financial Conduct Authority. Registration number 184046.
VAT No. 699 1338 84 Registered in England & Wales - number 3044873
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