Does attending an event actually move us forward?

Here's Nanette Strover's one-year journey from her first SIA

THE PREQUEL: THE LIGHTBULB MOMENT

Nanette took over an existing IFA practice, Hubert Child, in 2015. As part of the process of shaping the business to suit her vision, she reviewed all client investments to check if they were *"still fit for purpose".*

- Ethical investments have long been a personal interest of Nanette's but a "lightbulb moment" occurred during a presentation on social impact investment (SII) at a CISI presentation
- Recognising the power of targeting positive social good alongside financial return, she realised this area of advice was *"exactly what [she] was looking for to be able to deliver and meet clients' objectives"*, but she needed a deeper understanding
- The next step was the Social Investment Academy: *"I was going there to see what information is out there and to get closer to the action"*. The event introduced her to best practice amongst her peers and the broad range of available impact investing opportunities.

"I did what's good for me and my clients and joined the Worthstone community."

A LITTLE INFORMATION IS A DANGEROUS THING!

Nanette recognised a need to invest in resources to develop competency as well as relevant tools to equip her process. She armed herself with an Adviser Competency Training (ACT) manual and signed up as a subscriber to the Impact Portal. Why spend the time and money?

- People who care about what they invest in, expect you to know what they're invested in! Nanette recognised the importance of having a good understanding of a fund manager's approach
- She was committed to finding out *"what's going on under the bonnet"* of the funds in her clients' portfolios so she really valued the portal's independent product profiles, viewing them as *"absolutely critical"*
- Nanette, like any adviser, welcomes the availability of tools to facilitate these client conversations, therefore having access to the Worthstone Impact Portal *"makes it more tangible and easier to navigate and recommend solutions. I'm really impressed."*

GETTING QUALIFIED

Alongside learning more about the investment opportunities via the Portal, Nanette found time to study the ACT manual. Six months later she submitted her answer sheet and passed with flying colours.

- She found the concept of the three pots particularly useful in developing her understanding of where SII fits within the investment universe
- Previously, she had only been providing traditional investments but now that she's completed ACT she says: *"seeing other opportunities that aren't all traditional and solely about performance is refreshing and seems to be so for clients too."*
- She's found that by taking advantage of Worthstone's services she is now more confident delivering SII advice, noting *"I wouldn't have been able to have that discussion with my clients had I not done the training and been familiar with the funds that are available on the platform."*

SO, WHAT DOES SUCCESS LOOK LIKE FOR NANETTE?

Nanette's ambition is to develop a bespoke impact investment process for her clients. *"This is a long-term strategy… I'm trying to build a sustainable business, and this is where I see the future."* She aims to advance to Partner level on the Impact Portal to help her realise this goal.

When asked why she's bought a ticket to this year's SIA she replied:

"It's a group of like-minded individuals and I want to stay part of the community so, for me, the SIA is the place I have to be."

To come and network with other IFAs, like Nanette, at this year's SIA - see the agenda and book your tickets

HERE.