

Moneysprite Forest & Coastal Ltd

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Moneysprite are financial advisers based in Lyndhurst who specialise in savings, pensions, mortgages, insurance and investments.

Currently, 75% of Moneysprite's advisors are undertaking level 4 diploma qualifications, in three specialist areas, namely: Mortgage Advice, Equity Release and Advanced Financial Advice. The rest of the staff aim to begin their further studies early next year.



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These qualifications are not mandatory but will set the company above their competition and ensure that they are able to offer the best possible advice. The enhanced knowledge will be invaluable to staff members themselves and enable a mentoring structure for any new or junior members in future, which will influence the overall progression of the business.



There are four main areas of focus within the training programme. These are regulation, product knowledge, client understanding and customer service and relations. Through a combination of monitoring new or updated FCA regulations and the individual needs of their clients, the business assesses training needs and implements appropriate courses accordingly.

Moneysprite have employed and trained two new advisors within the last 12 months both of whom have been encouraged to take further qualifications. This will mean that their next recruits (early next year) will benefit from the support available. A mentoring program will give any new starters the confidence to advise and make decisions with clients.



Brockenhurst College