

Deedes: planners well placed to tap new breed of clients

By Maryrose Fison | 09:10:28 | 31 March 2009

A 'new model client' is emerging from a society that is technologically-savvy, and life planners are well placed to meet their needs, said Jeremy Deedes, managing director of York-based Planning for Life and one of 10 Kinder Institute-accredited life planners in the UK.

Speaking at the Institute of Financial Planning North of England conference in Leeds, Deedes described how the widespread use of the internet had created a new type of consumer who sought 'freedom' and 'personal integrity'.

He said society had shifted from a vertically integrated one to a 'horizontally self-built community', with individuals producing their own products, from self-built holidays to

music that can be sold online.

'Clients want peace of mind from an integrity as well as a financial point of view. They want to know that their investments are working well, but also that their money is being managed and used in accordance with their own principles,' said Deedes. 'Above all, life planning is transformational rather than transactional. It should be a process that empowers clients to make their own decisions about their lives.'