



# Our vision and values

# CONTENTS

01 Our name

---

02 Our vision

---

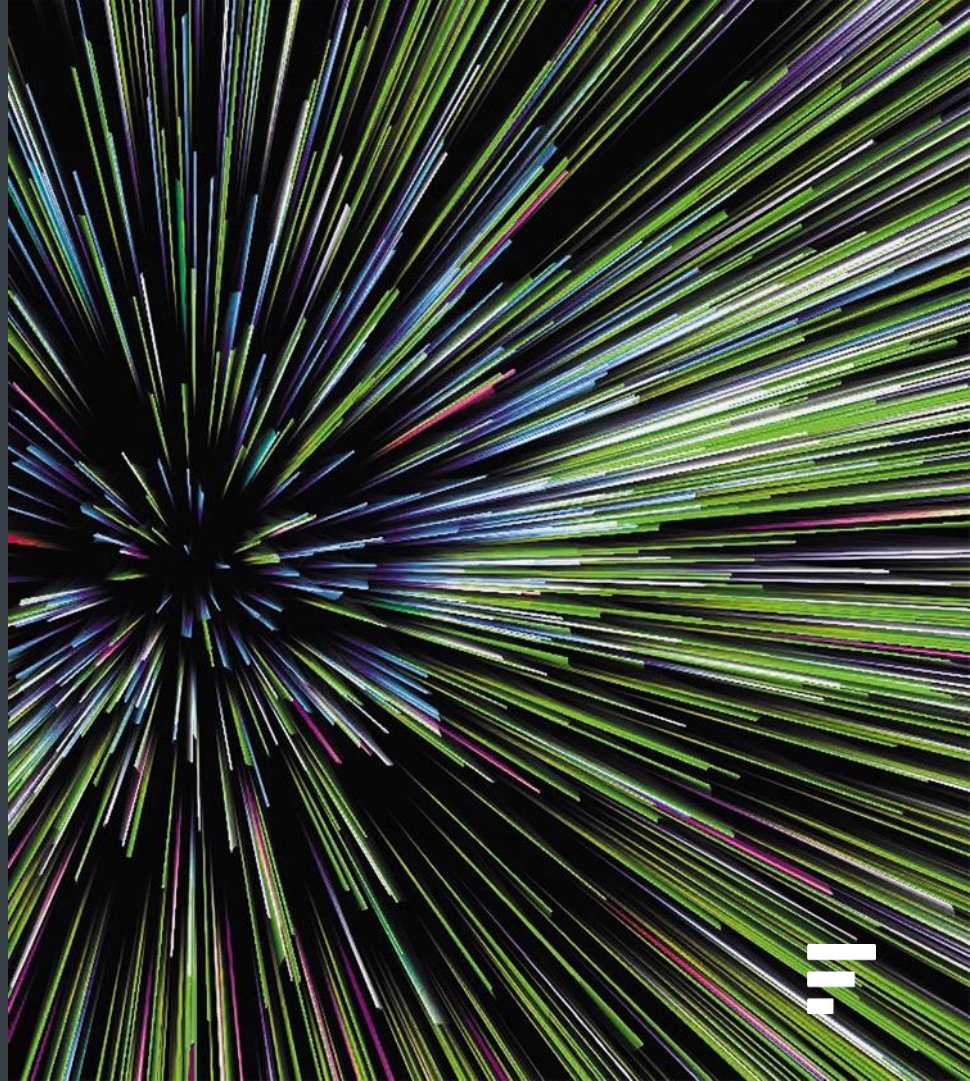
03 Our mission

---

04 Our values

---

05 Our personality





# WHY FINTEL?

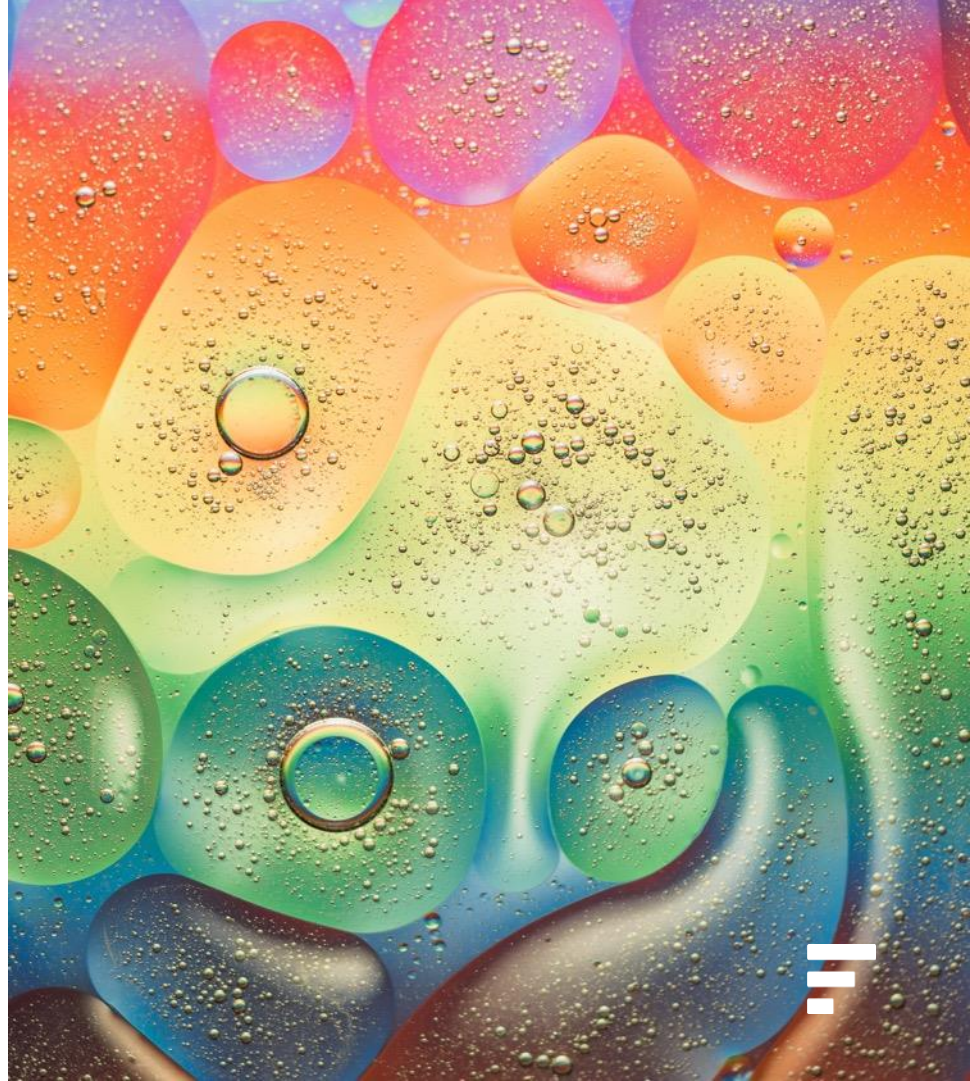
Our new name is a new word coined from combining three core elements of our brand:

**Financial services**

**Technology**

**Intelligence**

It reflects our ambition to be a positive influence at the heart of UK retail financial services, through intelligent expertise and insight.



# OUR VISION

OUR VISION AND WHY WE EXIST

Inspire better outcomes by  
enabling retail financial services  
to **operate more effectively.**



# OUR MISSION

## WHAT DRIVES US

To simplify and improve UK retail financial services by acting in the best interests of the market; connecting and enabling advisers, providers and customers through technology, people and insights that help inspire better outcomes for all.



# OUR VALUES

THE VALUES THAT DEFINE WHO WE ARE

Harnessing our market-leading **knowledge, influence and excellence**, we **simplify complexity, think bigger** and remain **future-focused** for our clients.





# OUR VALUES

THE VALUES THAT DEFINE WHO WE ARE



## KNOWLEDGE

We take the challenges our customers face and transform them into effective, relevant solutions which benefit everyone.



## INFLUENCE

We use our intelligence, awareness and experience to connect our clients with their customers and shape a better financial future.



## EXCELLENCE

We demand more of ourselves than our clients and ensure that our people and technology solutions are always the best available.



## SIMPLIFY COMPLEXITY

We understand the complicated nature of the financial world and help everyone create clear paths towards better outcomes.



## THINK BIGGER

We constantly explore new ideas with the interests of our clients and their customers at heart. Focusing through their lens inspires our thinking.



## FUTURE FOCUSED

We think ahead, rise to new challenges and break down future barriers to success. Our intuition helps clients maximise opportunities and avoid pitfalls.



# OUR PERSONALITY

THE PERSONAL ATTRIBUTES WE SHARE

Powered by an outlook of **positivity**, we stay **focused** on what's important and **passionate** about helping clients succeed. We also remain **grounded**, with confidence that our **inclusive** approach and **supportive** team are the backbone of prosperity.





