

Most Promising Financial Services Initiative



Buckles Investment Services –
The Snowdonia Fund

Ecology Building Society – C-Change
Mortgage

Enterprise Group – EDGE

New Leaf Financial Services –
Stepping Stones™ to Mortgage
Broking/Financial Advice

Standards International – Provision of
Training and Assessment for Financial Planners
to International Standards

This award for innovation is particularly aimed at small/medium enterprises operating in the financial services industry. The judges were seeking eye-catching initiatives that have made an impact in the business area where each firm is operating and have made a proven entrance into the marketplace, with continued future potential. The Judges found a winner in New Leaf Financial Services “Stepping Stones” initiative.

New Leaf has created a means of gaining academic qualifications and practical experience in an integrated programme to become a fully qualified mortgage adviser, with further opportunities to develop further competencies and qualification over time. Trainees come from across the nation, and on completion of training, set up their own local business and build a successful financial services career.

“This is a worthy initiative, as it is vital that the best training is available for people launching themselves into the financial services arena.”

Richard Lowrie

“New Leaf has innovated from their financial services training base to providing the practical experience to enable individuals to start new businesses in financial services. By stepping outside the normal boundaries of a training company, they have provided end-to-end support with strong built-in feedback and continuous improvement processes.”

Mark Goodman