



The Henwood Court Way

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**Redefining financial planning through,
collaboration, innovation and excellence.**



Our Community

Henwood Court is a special place
created by special people.

Gaye Morris
Client, and Former NED

A financial planning firm that invests in you.

Working with us is more than just a career; it's about building something together in a dynamic, people-centric organisation that thrives on innovation, entrepreneurship, and growth.

The Henwood Court Way



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Hear from Our Team...

I've worked with a wide range of businesses, from smaller enterprises to large global corporations, and I can truly say that Henwood Court offers a level and depth of advice that surpasses them all. If you're looking to spend more time with clients, achieve better outcomes, feel truly valued, and continue learning while working hard, this is undoubtedly the place to be.

Anthony Richards
Chartered Financial Planner



It's not just a word...
it's how we operate



Wellbeing

We are committed to the wellbeing of our team,
fostering a community where people are happy,
growing, and able to maintain a work-life balance
that works for everyone.



The Henwood Court Way

Hear from Our Team...

Monthly Wellbeing Walk

The wellbeing walk is a monthly event which encourages the team to leave their desks for half an hour and take some exercise in the fresh air and natural surroundings of the Country Valley Park on the office doorstep. All staff who wish to participate undertake a team walk of around 1.5 miles. The exercise and fresh air in a green space clears the mind helping focus throughout the rest of the day. It gives staff the opportunity to talk to colleagues including wider team members who they may not work directly with on a daily basis and helps to build team spirit and morale.

Lynette Coffey

Technical Client Associate

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Feel Empowered.

Contribute meaningfully to clients' lives by delivering customised, results-driven financial strategies that foster security and prosperity.



Feel Supported.

Work in an environment where collaboration thrives, with a close-knit team that uplifts and inspires one another.

Purpose Driven Meaningful Work, Real Impact



Be Genuine.

Work with amazing clients who value your expertise, trust your guidance, and see you as a key partner in achieving their goals. They become "professional friends," appreciating the meaningful impact of the work we do together.



Be Your Best:

Take on challenges that sharpen your skills and drive personal and professional growth.



Be Ambitious.

You will be part of a business committed to disrupting the norm, making an impact, doing things the right way, and building on its growing reputation for excellence.



**Dream big, work hard, stay focused, and
surround yourself with good people.**

Robin Sharma

Let's grow together

- ✓ Henwood Academy: Tailored educational & leadership opportunities
- ✓ Certifications Supported: CFP, FPFS, and more
- ✓ Continuous Learning: External training based on personal needs
- ✓ Collaborative Culture: Innovation, coaching, and idea-sharing
- ✓ Always Evolving: Striving to be the best, constantly improving

Hear from Our Team...

My priority at Henwood Court, before clients, is our people. We are supportive and nurturing, ensuring you have what you need to be your best. While our expectations are high, our focus is on making sure our team is happy, fulfilled, and proud to work at Henwood Court.

Nicholas Platt
Founder & Managing Director

*To read my full
message*

CLICK HERE



Small but **MIGHTY**

Leading Through Innovation

Joining Henwood Court isn't just a career move – it's a chance to be part of a mission – driven team dedicated to changing lives. We're growing to help more clients while staying true to our values of transparency, trust, and community. Unlike industry giants, we focus on what truly matters: putting our people and clients first.



As a growing yet agile team, we adapt swiftly, embrace challenges, and innovate with purpose. By integrating AI and cutting-edge technology—alongside our in-house portal and app, **Henwood Connect** – we've streamlined communication, boosted efficiency, and elevated the client experience.

With the freedom to trial, refine, and improve, we ensure the best outcomes for both our clients and our people.



**We are planting the seeds of
innovation, ready to grow,
thrive, and challenge the giants.**

Are you up for the challenge?



Achieving Individual Excellence

Be your BEST self

- ➔ **Own Your Role:** Take full accountability with a no-excuses mindset that drives success.
- ➔ **Deliver Exceptional Service:** Exceed expectations and inspire client referrals.
- ➔ **Be a Leader:** Provide outstanding service that earns 5-star reviews.
- ➔ **Continuous Improvement:** Embrace learning, innovation, and challenge the status quo.
- ➔ **Innovate the Impossible:** Push boundaries and contribute to a culture of excellence.





Whatever you are, be a good one.
Abraham Lincoln



As of 31 December 2024, our staff have been with us for an average of 6 years—some for nearly 19!

Recognising You:

Your hard work never goes unnoticed. We offer competitive compensation, performance bonuses, and benefits that truly reflect your value.

We proudly celebrate both professional and personal milestones—because all of life's wins matter. And yes, there's often cake!



Hear from Our Team...

Henwood Court has a friendly, hardworking and supportive work environment, with everyone working their hardest together to ensure the best outcome and service to our clients.

James Arnold

Associate Financial Planner

The Henwood Court Way



Don't Worry, Be Happy 😊

Creating a happy, positive office environment is essential—for you and our team. Here's how we make it happen:

- **Stay Positive:** Positivity is contagious. Bring a can-do attitude that uplifts those around you.
- **Focus on Your Lane:** Avoid negativity and don't suck the life out of others. Keep your energy focused on what truly matters.
- **Challenges Happen:** Seek support when needed. Challenges and frustrations are part of the journey. Know the right person to turn to when times get tough—we're here to help.

Diversity and Inclusion

We believe that diversity makes us stronger, fostering innovation and enabling us to better serve our clients. At Henwood Court, we celebrate individuality and encourage everyone to bring their authentic selves to work in a safe and supportive environment.

Our goal is to build an inclusive culture that values and respects differences across gender, identity, age, ethnicity, religion, nationality, sexual orientation, educational background, socio-economic status, and perspectives.

We thrive by embracing what makes each of us unique!



Transparency:

Clear and Honest from Day One

At Henwood Court, we pride ourselves on being transparent. We're like Marmite—you'll either love us or realise it's not the right fit, and we'd rather have that honest conversation today than a year from now.

Transparency creates a foundation of trust. It ensures our team feels safe to share their views, raise concerns, and know they'll be heard.

This means we don't shy away from tough conversations, set clear expectations, and celebrate a culture where honesty drives growth, collaboration, and mutual respect.

This attitude carries through to how we interact with all our clients. It's all about that 'carefrontation'. By fostering deeper relationships and making a meaningful impact in their lives, we create a level of trust that large companies would struggle to replicate sets us apart. For 20 years, our clients have relied on us to deliver truly exceptional service, building a strong sense of community that large firms struggle to replicate. It's not just about being transparent on fees—we ensure our clients fully understand every bit of value they're receiving.

Hear from Our Team...

The foundation of Henwood Court is our people, aiming to achieve the common goal of creating our clients tomorrow. People's individual values and outlook on life is just as important as qualifications and experience.

Peter Robbins

Director of Investment & Technical





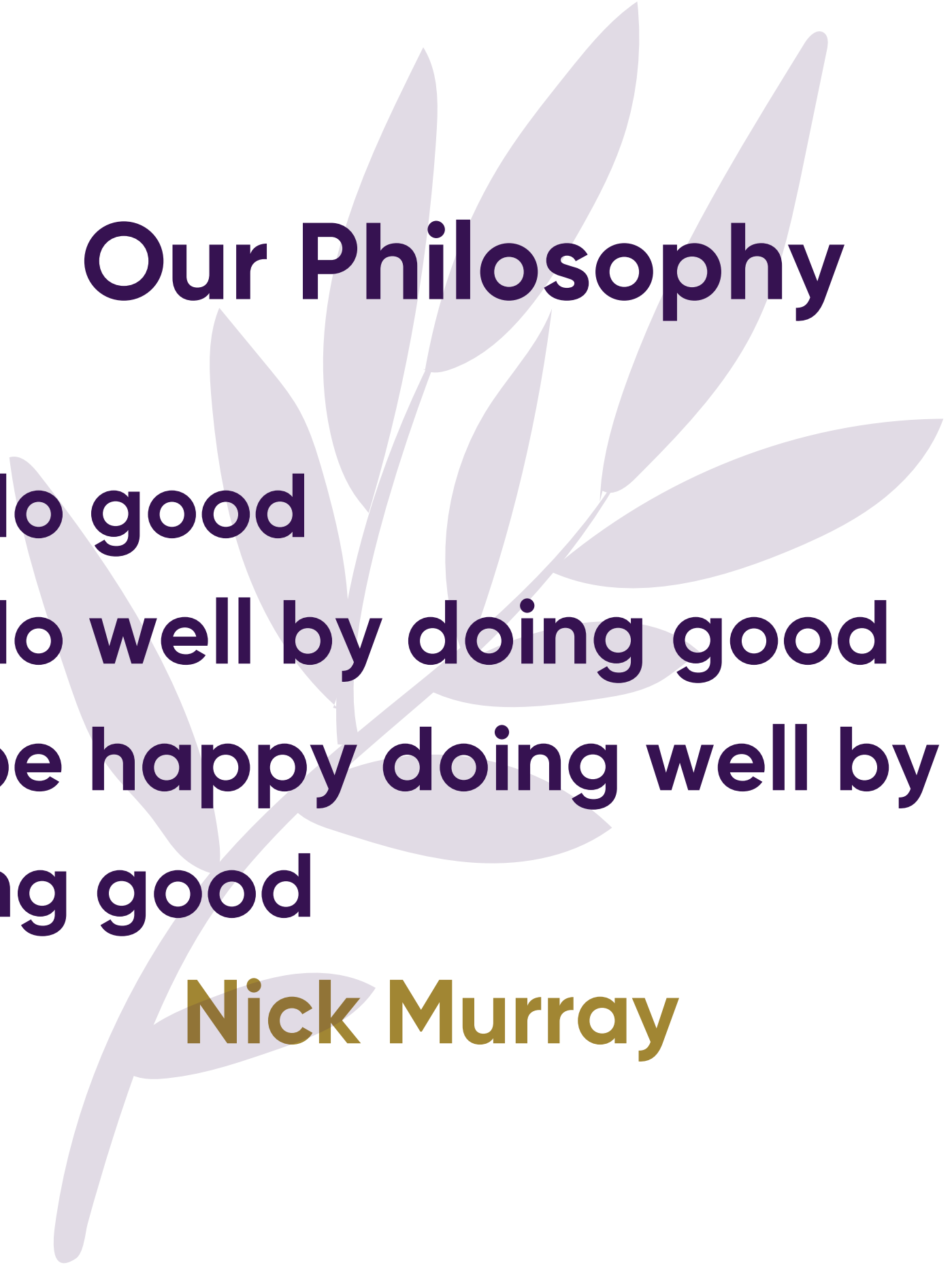
Feedback Drives Us Forward

- ✓ **Feedback Fuels Growth** – We actively embrace feedback to improve every day.
- ✓ **Open-Door Culture** – Regular surveys, anonymous channels, and monthly reviews ensure every voice is heard.
- ✓ **Constructive Leadership** – Strong leadership provides clear, actionable feedback to help everyone exceed expectations.
- ✓ **Innovation Through Ideas** – Feedback and suggestions drive our innovative culture, so we expect employees to actively seek ways to improve our services—because we listen!

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Our Philosophy

1. To do good
2. To do well by doing good
3. To be happy doing well by doing good

Nick Murray

Comprehensive Employee Benefits

Financial Benefits

- Market leading salary
- 3-7% employer pension contribution
- 4x death in service benefit
- Competitive discretionary bonus

Health & Wellness

- PMI – Bupa private medical insurance
- Monthly well-being walk and catch-up
- Staff and partners access to Henwood Connect and Portfoliosense

Work-Life Balance

- 25 days holiday, increasing by a day for every year from years 5-10
- Flexible work-from-home, hybrid policy
- Working in a beautiful barn, with Country Valley Park right on our doorstep

Career Growth & Development

- All exams and professional body membership paid for
- Study leave provided
- In house training academy

What we are looking for

We seek talented professionals with:

If these qualities
describe you, explore
job opportunities
here.



- ✓ A proven track record of success in financial planning, wealth management, or related fields.
- ✓ A passion for client success and a commitment to ethical, high-quality service.
- ✓ Exceptional communication skills and a team-oriented mindset.
- ✓ The desire to innovate and grow with us as we continue to expand our impact.
- ✓ The ability to work within a team environment for the collective benefit of the business.
- ✓ People who care.

Hear from Our Team...

Henwood Court is a company that truly values its people. They care about their employees, and during my time at HC, I've built some great friendships. I can honestly say I go to work because I love the people I work with. We also care deeply about our clients, building strong relationships over the years while supporting their financial and lifestyle needs.

Laura Smith

Senior Client Service Associate



What our clients say...

Henwood really has helped us to live the life we want. All the staff know us and give us a warm welcome whenever we go there and I trust the whole team for their knowledge.

Andrew & Diane Messenger

Innovation. Growth. Opportunity. The Henwood Way.

