

Equilibrium achieves highest Investor in Customers ranking of all 2020 assessments.

Independent financial adviser Equilibrium has been awarded the Gold Investor in Customers (IIC) accreditation, with a score that places them as the second-highest ranked financial planner in all IIC assessments over the past 15 years.

The wealth management and financial planning specialist, based in Cheshire, achieved the highest ranking of all businesses surveyed for the scheme in 2020. It was also the only organisation to achieve an overall average above 9/10.

The IIC scoring matrix is split across four key criteria: understanding customer needs, meeting customer needs, delighting customers and engendering loyalty. When assessing each business, the IIC team gathers feedback from clients, staff and managers to form the basis of its results.

Overall, Equilibrium was given a score of 9.1 out of 10.

Tony Barritt, managing director of Investor in Customers, said: “Equilibrium’s results are exceptional! Not only do they clearly show the extent to which the client is at the heart of everything the firm stands for, it also demonstrates that staff across the business clearly recognise the role they play in consistently delighting their clients.

“In the 15-years that Investor in Customers has been operating, Equilibrium’s scores – and fully justified Gold award – are an exemplar of best practice.”

Debbie Jukes, partner and head of client care at Equilibrium, added: “We were very pleased to have received the Gold IIC accreditation this year, achieving the highest accolade again has made us all incredibly proud.

“Client satisfaction is something we take extremely seriously, and it’s vital to us that all our clients – regardless of the size of their portfolios, or the nature of their financial goals – feel that our advisers truly care and always have their best interests at heart.

“We take great care to really get to know all our clients and ensure that they feel their needs are our first, second and third priority. To have this recognised by a distinguished body such as the IIC is a great feeling.”

Equilibrium was the only company out of the 200 assessed in 2020 which had more than 75% of its clients’ state that they would recommend the firm to a friend.