

Brown Shipley uses an FT Group Subscription to support the wealth needs of clients

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The challenge

All colleagues across wealth management firm Brown Shipley need access to market insights they can trust in order to stay informed and ultimately achieve their common goal of providing an excellent service to clients.

The solution

Through an FT Group Subscription, Brown Shipley's employees across the UK are equipped with a premium intelligence source, enabling its advisors and investment specialists to interpret and act on global events and trends.

The benefits

With a common point of reference across the firm, Brown Shipley is aligned in being informed on anything that may impact its clients, from macro economic events to the performance of individual stocks.



We think it's important that all colleagues are aware of what's happening in the market. For trends in wealth management, politics and the economic big picture, the FT is our go-to source.

Peter Sutton
Chief of staff, Brown Shipley



A shared, firm-wide goal

Wealth management firm Brown Shipley has provided tailored services covering all aspects of financial planning for over 200 years. Today it has more than 400 employees across 8 UK offices.

Although its services span investment management and lending, as well as wealth planning, the firm's core objective is a simple one - to deliver an excellent service for its clients. For a business like Brown Shipley, building trust is key and where clients today are more mindful of what's happening in the markets, being informed is crucial. From macro economic and political events, to the performance of individual stocks, staff across the firm are expected to keep on top of anything that may also impact clients.

Whether a frontline advisor or a member of a support function, everyone plays a role in ensuring clients fulfill their financial ambitions. Brown Shipley therefore makes premium market intelligence available across the entire firm with an FT Group Subscription.

Supporting informed client conversations

In terms of building and maintaining relationships, it's important for advisors to develop rapport with their clients. Sandra Dailidyte is a Client Senior Manager in Brown Shipley's Edinburgh office and highlights the need to have authentic, honest conversations with

clients about their aspirations.

"We say it's like talking over the kitchen table," says Sandra. "Clients want financial stability, to help their children pay the deposit for a home, to make sure they can retire comfortably. These are the conversations we have."

When discussing how those goals can be achieved, advisors have to strike the right balance in terms of how much market information is appropriate to cover. Sandra observes that clients are increasingly interested in their underlying investments and the FT is a vital tool in having those in-depth conversations.

"There is a certain level of expectation from clients that means you need to keep your knowledge up to date," Sandra explains.

"Clients want you to interpret events like elections or oil prices for example and what they mean to the market. To do so without a trustworthy source like the FT would make my job impossible."

Peter Sutton is Brown Shipley's Chief of Staff and echoes Sandra's view that client relationships need to be conversational rather than transactional. "It's about getting a really deep understanding of a client's needs and the wider context," he explains.

"If they run a business, you want to have an intelligent discussion with them about their industry. That's what we expect and one of the reasons why we subscribe to the FT."



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Sandra Dailidyte

Client senior manager, Brown Shipley



Providing a long term view on trends

Peter describes being informed as a “prerequisite” for anyone who works at Brown Shipley, but he sees the application of the FT’s analysis and insight going beyond aiding client conversations. Part of Peter’s role is to support the CEO Alan Mathewson in setting the overall strategy of the firm, which requires a degree of horizon scanning to understand trends as well as potential risks and opportunities in the wealth management sector.

“An aspect of the FT’s value to us is the insight on the market,” Peter says. “An example being a recent article about [Amazon and Alibaba moving into the wealth space](#). From a strategy point of view, it’s something that we need to be aware of and helps our overall understanding of the market.”

Equally in the investment office, the FT is used as a key source for understanding trends in the marketplace. Shanti Kelemen is an Investment Director at Brown Shipley and plays an important role in developing the firm’s processes and investment proposition for clients.

“The FT is especially valuable for us when we’re thinking about how we invest in some of those longer term themes,” Shanti explains. “Understanding what’s happening around sustainable investing or regulatory issues gives us ideas for things we need to think about and how we can improve.”

Shanti goes further in highlighting the importance of sustainable investing and ESG, and how the FT keeps her on top of how that space is evolving. “ESG is one of the areas that I think is the most interesting in terms of changing the investment landscape for how people manage money over the next 5 to 10 years,” she says. “The reporting in the FT on the amount of money going into ethical funds, what people are demanding and what are the investment returns is really useful both for us and our clients who read it too.”

The [FT Moral Money newsletter](#) has emerged as the foremost authority on the world of sustainable finance and its forward-looking, unique insights help organisations such as Brown Shipley better understand where their industry is headed.



Our FT Group Subscription provides unity at a firm level in that we all have access to the same flow of information and articles. It gives us a common base as a company.

Shanti Kelemen

Investment director, Brown Shipley



Flexible access to suit all reader needs

By having an FT Group Subscription, Brown Shipley benefits from the flexibility of all staff having access to a common source of trusted market intelligence. Depending on each reader's preference, FT content can be surfaced, viewed and shared across a whole range of formats and devices.

Sandra visits FT.com twice a day and uses email newsletters to make sure she doesn't miss anything that could be relevant to a client conversation. She's also recently discovered [FT podcasts](#) as a great way of staying informed.

"The FT's podcasts are a fantastic alternative to reading," says Sandra. "Every morning I walk around the block and listen to the [FT News Briefing](#). It's 10-12 minutes of discussion around the main headlines and it's now part of my routine."

For Shanti, having the FT app on her phone enables her to quickly catch up on market developments between meetings. "The app is great for an up to the minute flow of events that are happening throughout the day," she explains. "If you've been in meetings all morning and then you need to speak with a client, [fastFT](#) gets you up to speed on any new data points you might need to be aware of."

The firm's FT Group Subscription is an endorsement of what Brown Shipley expects its people to be reading. In Peter's view, the FT is a fundamental part of equipping teams across the firm with the information they need to continue delivering an excellent service to clients.

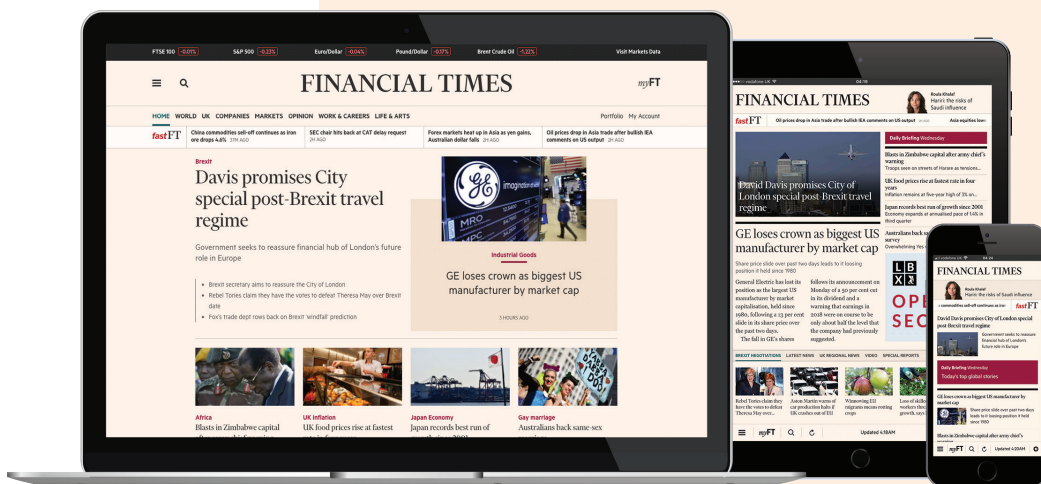
"When you join the firm you get your phone, you get a computer," Peter concludes. "The FT is absolutely part of that toolkit."



When you join the firm, you get your phone, your computer. The FT is absolutely part of that essential toolkit.

Peter Sutton

Chief of staff, Brown Shipley





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