

Carla Brown

Managing Director and Chartered Financial Planner at Oakmere Wealth Management

Q&A

Meet Carla

Before joining SJP, I worked in a bank as part of a private client IFA team. Whilst I enjoyed the client work, I had become dissatisfied with my position; I felt we couldn't correctly look after our clients with a very restricted offering and no ongoing advice. In my opinion, we should be able to offer clients a lasting relationship – this is what actual financial planning is about, not just providing a product and never seeing the client again!

Why did you join SJP?

I went into my first coffee meeting with SJP purely as a favour for a friend who had referred me. I had no intention of joining as everything I had heard was not very complimentary, but all the knowledge I had was purely anecdotal, and I had nothing to back it up. Two hours later, I came out of the meeting wanting to know more – it sounded like an inspiring proposition.

Everyone I went on to speak to had a genuine can-do attitude, whether it was the Acquisition team or the people I talked to in the Cirencester head office when I went for a day's visit. It seemed to be a grown-up

organisation with the client at the core. They explained how I could build a business for myself; rather than continuing under another employer, why not do something that would benefit me long-term with the opportunity to build capital?

How has launching a business with SJP benefitted you?

I am now in control of my own destiny.

I have a business that I am so proud of, I can now provide for my family, and I can take time off and travel when I want to, as I have built a team to support me.