

Wealth Aspirations Harnessing Zoom for Financial Advice

Wealth Aspirations LLP, Financial Advisers to The Stars, are seeing a huge shift in behaviour patterns which has lead them to overhaul their business.

LEEDS, UNITED KINGDOM, March 1, 2021 /EINPresswire.com/ -- Wealth Aspirations Independent Financial Advisors have moved to the beautiful converted Mills at Wharfebank in the picturesque market town of Otley.



Wealth Aspirations New Offices

Tom Mannion, business owner stated that the shift in behaviour patterns of clients regarding how they interact in the planning process in the Leeds and Harrogate area has changed as a result of Covid-19.

“Many clients are now opting for advice over Zoom as well as Face to Face. I think this will be a monumental shift in the way advice is administered. We struggled previously with integrating meeting software with our older clients but since lockdowns, many of our clients over the age of 70 have really adapted and enjoyed having the ability to speak to and see their adviser at the touch of a button. We wanted offices that allowed us the ability to host these meetings at distance in a suitable environment which our last offices just didn't offer”

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We completely overhauled our website, simplified it and created a 6-step guide to explain just what to expect”

Thomas Mannion

This is a common trend that seems to be perpetrating across the region.

The shift to online has highlighted another problem that many in the financial services industry don't realise and that is just what to expect when you speak to an independent financial adviser.

“We completely overhauled our website, simplified it, and created a [6-step guide](#) to explain just what to expect.”

Wealth Aspirations are known as leaders in advice for pensions, investments, insurance, and mortgages and are excited by the latest developments in the market.

For more information, visit [the new website now](#).

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