



# PARADIGM NORTON

established in 2001

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## Mission

To build the UK's leading fee based financial planning firm as recognised by clients, our peers, and external validation.

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## Core Purpose

To help our clients determine the life they do want, the life they don't want, and the cost of each.

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## Core Values

'Client first' mindset  
A 'can do' spirit  
Integrity, Professionalism and Honesty  
Passion for what we do  
Fanatical attention to detail  
A Team based approach  
An entrepreneurial spirit  
Money is a means to an end, not an end in itself

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## Vision

To make a profound difference in the lives of our clients  
To leave a legacy by changing the advice and money paradigm in the UK  
To encourage a culture of giving and philanthropy  
To be a cornerstone in the building of the profession of financial planning in the UK  
To build a business of size and scale whilst never compromising on quality

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## Our Strategy

(How we will achieve our Purpose and Vision)  
Consistently serve our clients with unparalleled excellence and care  
Create and build a sustainable and profitable financial planning business  
Build a firm based on sound money management principles  
Recruit and train the most gifted and talented financial and tax planners in the UK  
Create career opportunities for the next generation of planners  
Work with leading edge technology solutions

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## Our Five Year Goal

Bristol head office supporting regional branches, to include a London office  
A growing Charity practice  
Minimum financial expectation - Our share price doubled

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