

JONATHAN FINLAY, FINANCE DIRECTOR OF KELLANDS (NORTHERN IRELAND) LTD, DESCRIBES HIS TYPICAL WORKING DAY.

MAKING IT HAPPEN!

DESCRIBE A TYPICAL WORKING DAY.

I have found there is no such thing as a 'typical' working day in financial services. I prefer to arrive at the office ahead of my colleagues to give me time to review what is planned for the day, and before the phones start ringing! However, there are days when an appointment with a client or a representative from an insurance company or fund manager will be at the top of my agenda. The day can be made up like this, and often, I have to deal with matters that appear unexpectedly and need urgent attention. There are also times when I have to honour evening commitments

HOW DO YOU DEAL WITH THE DAY'S ACTIVITY?

It is very important for me to plan ahead where possible, and my diary system allows me to do this, although there will always be immediate issues at the top of my list of things to do. The nature of financial services often means it will take some time, perhaps up to three months, for a particular piece of business to fall into place. In the meantime, there will be administrative and regulatory issues to attend to, and they have to take their place in my schedule. I also have to allow time to discuss business with current and prospective clients to make certain I know where they are now, and where they want to be in terms of their personal financial situation. In this business, it is absolutely essential to make time to understand your client so that they can understand my particular advice. In my role I must plan for regular meetings with the company accountant and our bank to keep my finger on the financial pulse of the firm. The challenge lies in controlling the events of the day, rather than letting them control you!

WHAT DOES YOUR JOB MEAN TO YOU?

My job is very important to me, not only because there is personal satisfaction and fulfilment, but it also allows me to provide for my wife and young son. I realise how good a job it is and I also know there is a responsibility to encourage and support professional standards. The role of finance director was a new direction in the firm, and I have been enjoying the challenges it presents, but at the same time, learning from the experience of my fellow director and other professionals. The work does

have high points and low points, particularly when certain things do not go according to plan, but I am an optimist and am always keen to look for improvements and a successful outcome in any situation.

HOW DID IT ALL BEGIN?

I have been in financial services for thirteen years, and during that period, I have been a tied adviser only able to sell and advise on the products of one company, before becoming an independent financial adviser. During all this time, I have worked with Robert Forster who is our managing director, and also a close friend and mentor. I was working with Robert when he set up Kellands in February 2003 and I was delighted to have the opportunity to become finance director two years later. All my experience in this industry has taught me to have a focus on the direction I wanted to take, and to learn from experience along the way. I have realised that once you have reached where you wanted to be, you cannot rest on your laurels because there is always room for improvement and you must not close your mind to new ideas. It is all too easy to become complacent, and in this industry, some would say, you are only as good as your last piece of business.

HOW DO YOU PREFER TO WORK?

From my early days in financial services, I realised I could not be a Lone Ranger, as success depended on a range of people working together. As a result, I now fully appreciate the support and work of a good team. I believe Kellands now has the best team ever in the history of the company, and I know I can rely on an excellent group of support staff in the running of the firm. This does not mean to say I do not take individual decisions, but having taken them, I need the help of good trustworthy colleagues to deliver. This concept of a team means that I work very closely with Robert and our administration director, Julie McCrea, to deal with a wide range of issues and priorities. Our current priorities now include the introduction of new advisers into the company, and the integration of a business we recently purchased into our systems and procedures. Other projects include the launch of a new asset management service for our clients and continuing to develop business links with other professionals, such as solicitors and accountants. There is



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also the need to be aware of, and comply with, a raft of regulations from the Financial Services Authority to ensure we run our business in compliance with their requirements. It is obvious no one person can do this by themselves, and so working as a cohesive team is absolutely vital. I value the input from my colleagues, for example in meeting deadlines and timescales, and all this contributes to a buzz in the firm.

HOW WOULD YOU SUMMARISE YOUR JOB?

Every day is different and it is similar to pulling a whole range of threads together, whether they are financial, regulatory, or advisory, into a single strand. I was once told my role was like the circus act where a performer keeps many plates spinning at once without letting them fall and smash. I now know how he feels!

WHAT DO YOU DO TO RELAX?

It can take time to wind down after the day but my son can certainly divert my attention away from the office! Apart from being with my family I enjoy going out for a meal with friends and there is the continuing challenge to improve my golf handicap. For a longer break I am fortunate enough to have an apartment in Spain although a mobile phone means I can stay in touch with developments back in the firm.