

# Fresh Faces: Katie Butler of Alexander Beard

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Meet Katie Butler of Alexander Beard.



Katie Butler, financial planning associate at Alexander Beard Group in London, is no stranger to being a fresh face in financial services.

‘I’m used to being the youngest person and one of maybe three females in the room. I think that is changing though, which is good,’ she says.

‘People my age are genuinely interested but it is a cultural thing, there is a perception of financial advice being a dusty old profession and I don’t think any of my friends would think of going to seek out financial advice.’

## **Internship route**

Butler was no different, having graduated from Sheffield University in 2009 with a degree in English Literature, she planned to work in publishing before taking a job at Leprêtre & Partners (L&P), which soon after merged with Alexander Beard.

‘My degree was nothing to do with finance. I started temping here alongside various unpaid internships and after about a year Andrew [Moore, L&P partner] offered me a proper job,’ she says. ‘I like the way the company works and I like the people here. I could see the purpose of financial services and how it changes people’s lives.’

After stints as a marketing assistant, a paraplanner and on group pension schemes, Butler finished her diploma, then started working as an adviser this year at Alexander Beard Group.

‘After the merger there was an opportunity for me to become an adviser so now I have my own little client bank. Meeting clients brings a whole different side to it and has been a bit of a learning curve,’ she says.

‘It’s a lot less formulaic [than paraplanning], each person has different needs, but it is more rewarding than doing behind-the-scenes work.’

She is still meeting some of her clients for the first time but relishes this side of the role. ‘Building client relationships is the best thing; getting to know people and finding out about how the world works,’ she says.

Butler says studying for the exams alongside a full-time job has been a challenge, but she is still going, studying for the RO8 pension freedom update paper. ‘Chartered is the next goal. You have to be learning all the time or you stagnate,’ she says.

## **Family friendly**

However, she does not have long to settle into her new role as she will be going on maternity leave at the end of February. Fortunately, she says the firm does not see this as a barrier to her progression.

‘Everyone has been really supportive, and a lot of people in the company have kids of their own,’ she says, adding that other firms should follow suit.

‘If you want to encourage young people, young women particularly, to work in this industry then that needs to work... The great thing about this job is it is quite flexible, so I can still keep in touch with clients and it should be easy to phase back into it. It is a good job if you have a young family.’

## **Charity Work**

‘One of the group pension schemes we run is for a firm called MyBnk which is a financial education charity that goes into schools so we do their pension scheme and we try and raise their profile on the site,’ says Butler.

‘Personally, I’m involved in a church in Greenwich so I do lots of work with kids through that, I help out with the crèche.’

## **First Job**

‘My first job was on Saturdays in a cheese shop in the covered market in Oxford, which was quite niche, says Butler.

‘I learned a lot about cheese. I used to sell it all day and eat quite a lot of it.

‘I couldn’t go home on the bus afterwards because I stank.’

## **Retirement Plans**

‘I’d like to do more travelling and spend time with family,’ says Butler.

‘As much as I’d love to see the world, England will always be home. I can’t imagine retiring in London though. Maybe I’d do something part-time or volunteering. It would be good to carry on doing things.’

This article was taken from New Model Adviser website - [http://citywire.co.uk/new-model-adviser/news/fresh-faces-katie-butler-of-alexander-beard/a864033?re=37415&ea=420346&utm\\_source=BulkEmail\\_NMA\\_Daily\\_PM&utm\\_medium=BulkEmail\\_NMA\\_Daily\\_PM&utm\\_campaign=BulkEmail\\_NMA\\_Daily\\_PM#i=1](http://citywire.co.uk/new-model-adviser/news/fresh-faces-katie-butler-of-alexander-beard/a864033?re=37415&ea=420346&utm_source=BulkEmail_NMA_Daily_PM&utm_medium=BulkEmail_NMA_Daily_PM&utm_campaign=BulkEmail_NMA_Daily_PM#i=1)