

# Top 100, 2008

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# Focus on people is the key

## 8

### Lincoln Financial Group

Financial services

**Turnover:** £258m

**Assets Under Management:** £5.33bn

**Customers:** 470,000

**Policies:** 775,000

**Chairman/MD:** Michael Tallett-Williams.

**HQ:** Barnwood, Gloucester.

**Staff Employed:** 171 plus 250 through the outsourced relationship with Capita Life and Pensions Services

**Lincoln Financial Group believes its focus on people and the delivery of excellent services is the key to its success in 2008 and beyond.**

Since its establishment in 1934, the company has grown as part of Lincoln National Corporation in the US, and has thrived in its county headquarters, rising to a prominent position in the top 100 Gloucestershire businesses.

Named after one of the most revered presidents in US history who was known for his honesty, integrity and strength, Lincoln focuses on these values, and is strong enough to deliver on its promises to its partners and customers. The huge range of products and services offered by the Barnwood-based company include pensions including flexible retirement planning products, unit trusts, ISAs, investment bonds, life assurance, critical illness, income protection, permanent disability cover and elderly care cover.

As well as marketing itself through financial advisers, it also focus on marketing to its existing customers to earn their loyalty. It provides the financial adviser market with reliable and flexible solutions which enable clients to transition through retirement, protecting and enhancing wealth to enjoy an income for life.

Lincoln Financial Group chairman and managing director Michael Tallett-Williams has watched the company grow since his arrival as chief financial officer in 1995 and has positive views on the past year and year ahead.

"The past year has been an exciting one for Lincoln Financial Group.

"While continuing to maintain our focus on policy retention and the financial stability of the group, we have launched our new innovative retirement product range 'Lincoln i2live', which builds on the portfolio of protection and investment products already offered.

"We have also continued to focus on people and processes to deliver excellent service to our customers.

"During 2007 we have been re-awarded the Investors in People accreditation, which I believe demonstrates our continued commitment to our people and their development.

"I believe that Lincoln is in an excellent position, set to achieve our goals in flexible retirement solutions.

"We have a strong balance sheet, good earnings potential and a highly skilled workforce which is growing, all of which are focussed on returning shareholder value.

"I am therefore confident that 2008 will be an even more exciting year for Lincoln."



HQ: Lincoln Financial's offices in Gloucester

**THE TEAM:** legal and corporate services director Fleur Hobbs, managing director and chairman Lincoln UK Michael Tallett-Williams and business development director Helen Turner



**POSITIVE VIEWS:** Michael Tallett-Williams, chairman and MD Lincoln Financial Group