

## CASE STUDY

## Empowering goal-based financial planning with FE Analytics

How Chartered Financial Planner Louise Woollard uses FE Analytics to deliver consistent, data-driven advice.

### Background

Louise Woollard is a Chartered Financial Planner with over 26 years of experience in financial services—22 of which have been as a self-employed adviser. Recently joining True Potential Wealth Management, Louise is focused on delivering goal-based financial planning, working closely with clients to align investments with life objectives. Louise has been using FE Analytics for around 20 years and continues to rely on it as an essential part of her daily routine.

She uses the platform to measure and compare fund performance, helping her validate investment choices and support the financial goals set with her clients. With a strong emphasis on personalised service, Louise prioritises tools that allow her to deliver clear, tailored insights backed by data.

### Objectives

Louise required a solution that would support her practice goals:



Goal-based planning  
workflows



Fast, flexible fund  
comparisons



Consistent, accurate  
investment data



Reporting efficiency  
for client meetings



Reliable and easy  
to access

# Achievements

Louise relies on FE Analytics' consistent uptime and powerful comparison tools to deliver goal-based planning efficiently. The platform's reliable daily data and adviser control enable her to validate investment choices independently, improving operational efficiency while strengthening client conversations with clear, data-backed insights.



**Reliable, consistent access:** Louise highlighted the system's consistent availability as a major strength: "It's never down – which blows my mind, given what other companies are like."



**Powerful fund comparison tools:** FE Analytics enables her to compare funds efficiently, providing valuable insights to guide client conversations and present stronger goal-based planning aligned with client needs. This investment advice is also backed by daily data to improve accuracy.



**Control for advisers:** As a self-employed planner with True Potential Wealth Management, Louise values tools that she can access directly and depend on:



**Supports growth and efficiency:** The ease of use and depth of data allow Louise to operate efficiently without relying on internal research teams or slow data requests.



Using FE fundinfo tools  
can improve operational  
**efficiency by  
up to 55%**



*"We're very happy with the outputs from FE Analytics. The tools help us work more efficiently and make faster decisions."*

**Louise Woollard**  
Chartered Financial Planner

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