

Staff Spotlight:

Meet the team behind the scenes at Vizion Wealth

Samantha Garrett

Wealth Management Review Co-Ordinator & Administrator

Did you know? My favourite TV shows are either The Office (US) or Brooklyn 99 - please don't ask me to decide which is best!

Describe your role at Vizion Wealth:

As the Wealth Management Review Co-Ordinator & Administrator, my role is to liaise with clients to confirm their upcoming meetings and make sure that all the necessary documents and information are prepared and accurate. I take pride in keeping everything running smoothly behind the scenes so that our advisers can focus on delivering exceptional service to our clients.

What are your hobbies or interests outside of work?

Outside of work, I love spending time with my family and friends—they're such an important part of my life. I also enjoy unwinding with my two cats, Bella and Bonnie, who keep me entertained with their quirky personalities. Another passion of mine is Irish dancing, which I've been practicing for years. It's not only a great way to stay active but also a wonderful creative outlet that brings a sense of tradition and community into my life.

What's your favourite part about the working culture at Vizion Wealth?

It's definitely the people. Everyone here is not only incredibly supportive but also genuinely committed to helping each other succeed. There's this great balance where we all work hard and stay focused, but we also know how to connect and have fun when the time is right. It's such a collaborative and positive environment—it makes coming to work enjoyable and creates a culture where you feel encouraged to grow.

What do you enjoy most about working with Vizion Wealth?

The work environment is just brilliant. It's the perfect mix of being friendly and focused. Everyone here is driven and works hard, which really inspires me to bring my best to the table. And while we know how to have a laugh, there's a great sense of professionalism.

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Knowing that the work I do plays a key role in helping our advisers support clients in reaching their financial goals is incredibly rewarding. I like to think of myself as a behind-the-scenes problem solver, ensuring that everything is in place for our advisers to do what they do best—provide exceptional guidance to our clients. It's satisfying to know that my attention to detail and preparation helps people gain clarity and confidence about their financial future.