



INNOVATIVE. INSPIRATIONAL. IMPASSIONED.

Speaker. Entrepreneur. Author

Charlie Reading is a trading style of Efficient Portfolio Ltd. Registered in England No. 5812385.
Registered office: Registered office: Portfolian House, 30 Melton Road, Oakham, Rutland, LE15 6AY



As a successful entrepreneur, award-winning global speaker, Chartered Financial Planner and published author, Charlie Reading has acquired a vast business acumen and an insightful, innovative and inspiring approach to helping others. Over the last two decades, Charlie has worked with a huge range of people and has honed his skills in identifying their needs and helping to deliver their unique goals.

Charlie is passionate about helping others achieve freedom, clarity, and security. His ultimate aim is to turn goals into a reality. He does this in many ways: through the array of business and networking services he provides, through the variety of workshops and events his hosts and through his books and online courses. However, Charlie is most in his element when he has the opportunity to speak and interact with others in person.

Charlie is committed to a healthy, active lifestyle, and highly values growth, learning and development. His drive and determination is infectious and leaves audiences and clients alike feeling motivated and energised.

As a loving husband to Caryl, and dedicated father to his two daughters, Charlie loves nothing more than creating outstanding memories with his family. Whether they're on safari in South Africa, or Scuba diving in Thailand, adventure, fun and happiness is the Reading family motto.

WHAT'S THE PROBLEM?

Whether it's money, time, wellbeing or general happiness, all entrepreneurs and business owners share one common problem: When did their passion turn into their punishment?

Across the world, millions of entrepreneurs started their businesses with a passion to create a better life. Whether they wanted a better work / life balance , or they wanted to spend their time doing what they love, business owners once had that fire inside them. But is it working out?

Lack of profit, lack of time, and serious lack of love for what they are doing, results in 80% of businesses failing in the first 5 years.

As an owner of multiple businesses himself, Charlie has had all of these feelings over the years. Running a successful Financial Planning business, Charlie also meets a lot of other business owners, and time and again he sees these same concerns cropping up. They are all working every hour God sends, they aren't earning as much as they think their effort deserves, and the fun of being the master of their own destiny is draining away. There's no time or money to have fun and create memories with their loved ones.

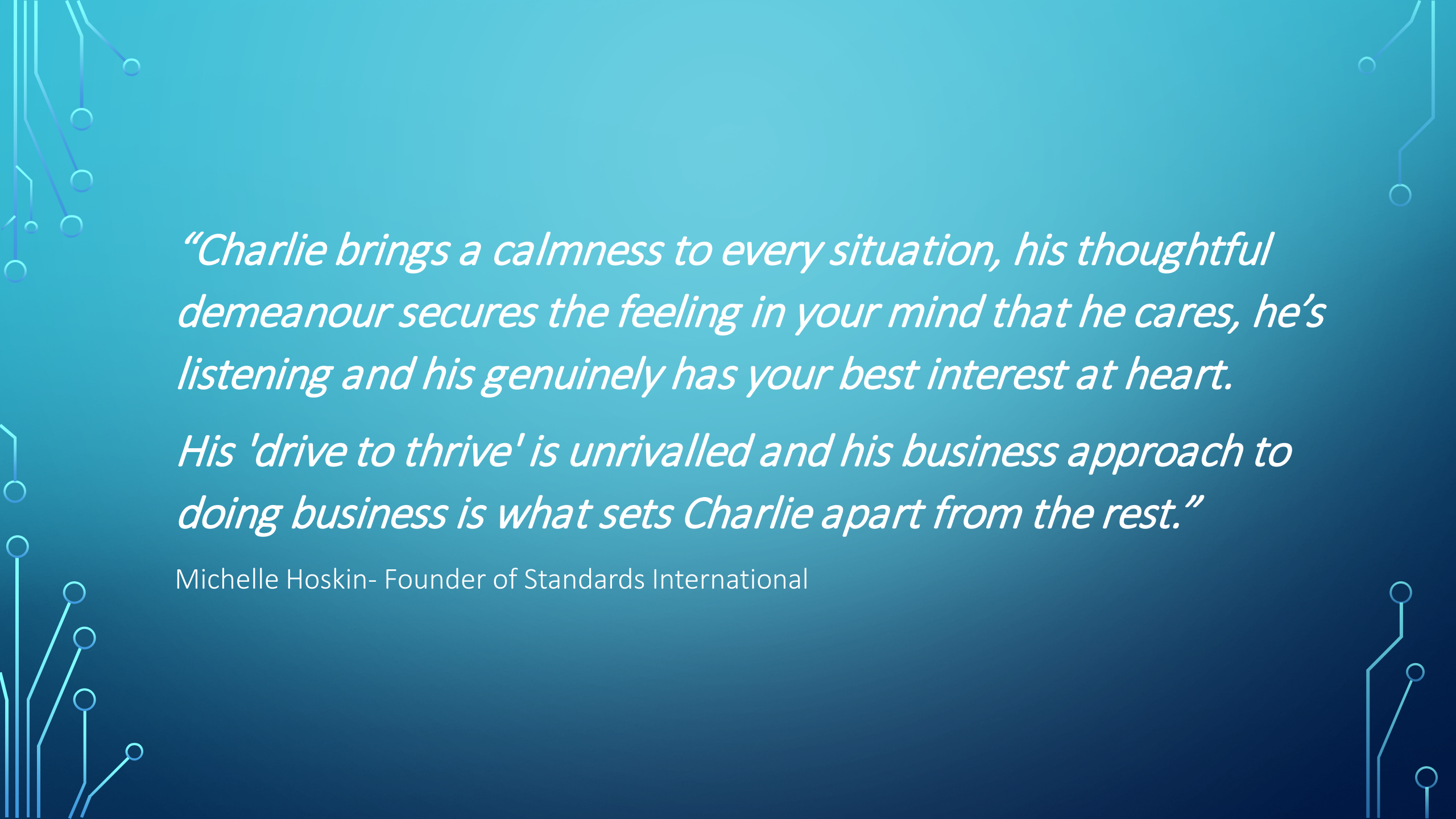
"We only get one shot at this life; it isn't a dress rehearsal! When asking people on their death beds what they regret about their life, studies show it is the experiences and the relationships that they wish they'd spent more time on. It wasn't responding to emails more quickly!"

WHAT'S THE SOLUTION?

“Over the years I have read over 150 business books, attended courses and workshops and met with some amazingly successful entrepreneurs in the hope that I can get just a few ideas from each. What I teach is a culmination of those efforts. It’s all the best ideas I have found since setting up my business, all in one succinct place. It’s the ideas that allow me to take 3 months of the year off whilst generating an increase in new business of over 50% in 5 of the last 6 years, all whilst enjoying life in business more and more. This is what I call Entrepreneurial Happiness.

“People used to strive for power and money, but what are the use of these if you arrive at retirement without your health or happiness. My talks will help you redress that balance.”



The background is a dark teal color with decorative white and light blue circuit-like lines in the corners. These lines consist of straight segments connected by small circles, resembling a stylized PCB or network diagram.

“Charlie brings a calmness to every situation, his thoughtful demeanour secures the feeling in your mind that he cares, he’s listening and his genuinely has your best interest at heart.

His 'drive to thrive' is unrivalled and his business approach to doing business is what sets Charlie apart from the rest.”

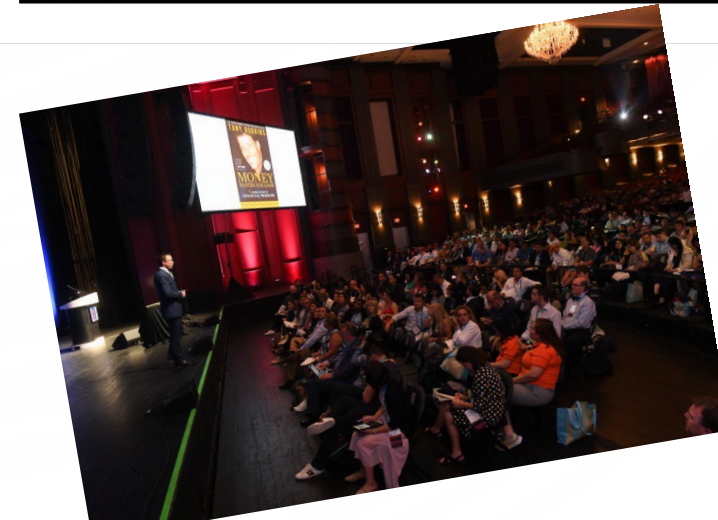
Michelle Hoskin- Founder of Standards International

ABOUT CHARLIE READING: AUTHOR AND SPEAKER

Charlie is the author of 4 books: 'The Dream Retirement', 'SMART Money', 'Life Legacy Gift' and 'Entrepreneurial Happiness'. Each book is designed to help a very different audience, from those concerned with retirement, those just starting out in their careers, those wishing to secure the financial future of their loved ones and business owners looking to get the most of life and bring the fun back to their business. However, all of his work shares one clear aim: to help people gain clarity, confidence and certainty over their futures, whatever their goals.

Charlie is also an award winning speaker and has taken to the stage with some of the best-known global experts at events such as MDRT in Miami, Singapore and Nashville, the National Achiever's Congress and the CIMA Annual Conference.

He also runs his own events and seminars, which range from 45 minute informative talks, through to 3-day immersive workshops.



“Charlie is a great speaker with lots of energy and enthusiasm. With his background in financial planning, he knows first-hand the challenges for advisers and also with building a business. His talks have great content that can be broken down into different stages and topics so that they are suitable for shorter talks and longer presentations. They always have something for the audience to take away. As a published author as well, there is always additional content available and further reading. His content can be used globally, whether it’s to do with building a business or creating professional contact links, something for everyone.

On a personal note, Charlie is an inspiration. When he realised what he wanted to create out of his life and his future, he went for it and now is a seasoned triathlon athlete and Iron Man, family man, reliable colleague and a great friend. He exudes the whole person concept better than most people I know. Having also recently taken his business through a succession process, he has personally lived out and been successful at overcoming most of the challenges advisers face.

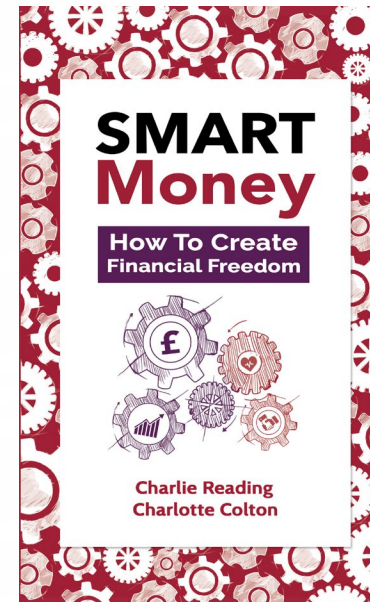
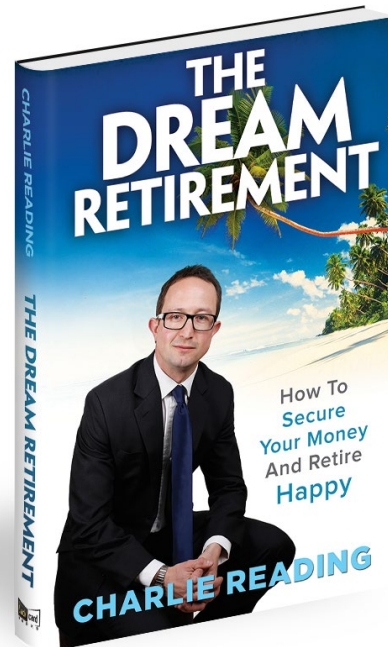
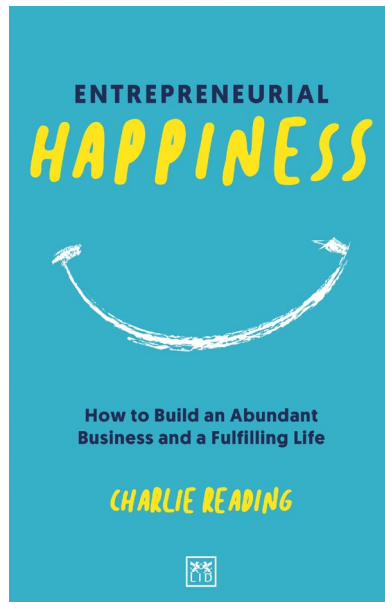
Charlie is reliable, genuine and he cares about the industry and the people within it, wanting everyone to build a better future for their clients, their teams and themselves and their families. I wouldn’t hesitate to have him speaking at any event we were running. “

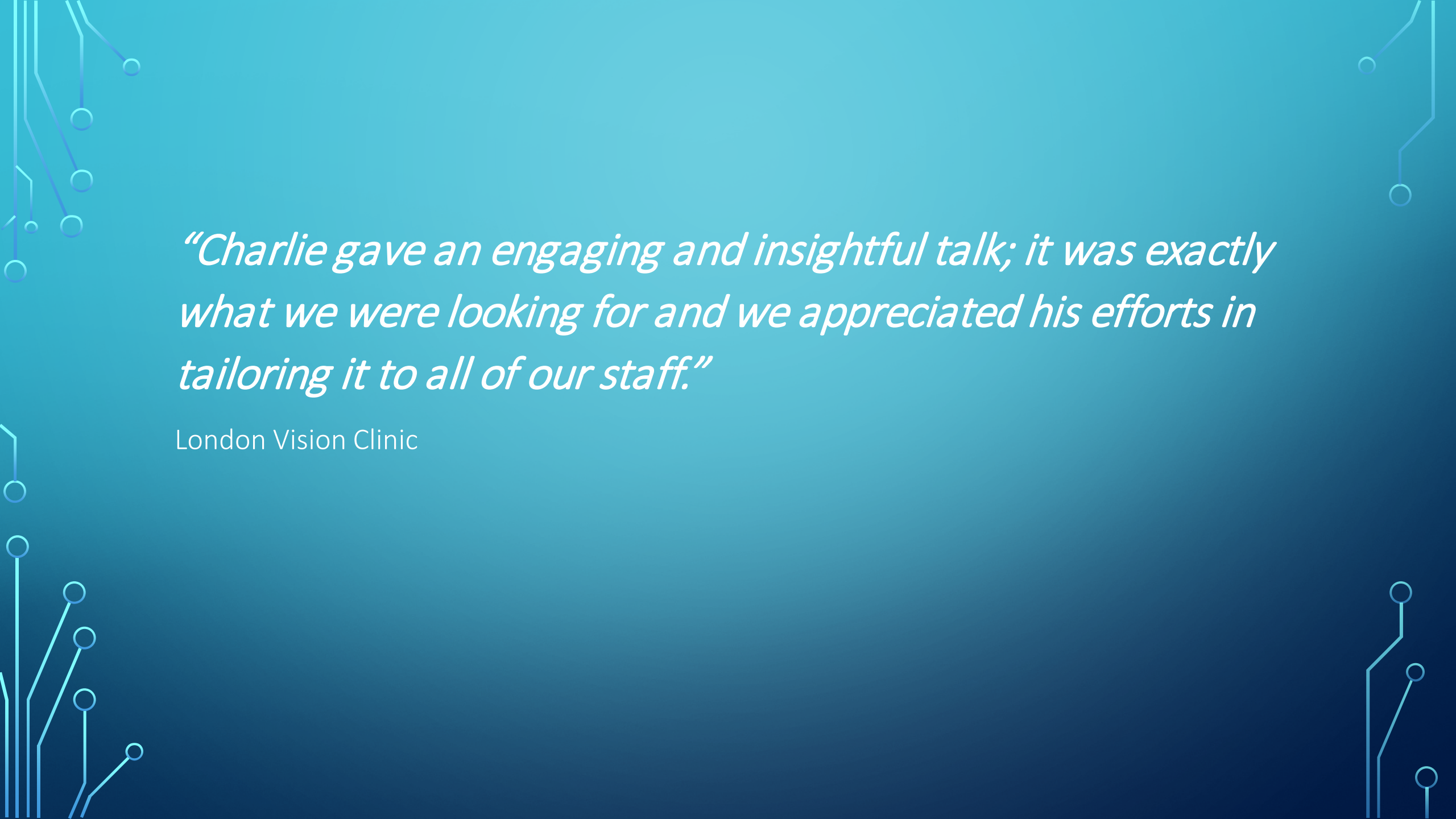
Sarah Hogan FPFS

Company Director, KBA Financial

"Charlie Reading presented at the CIMA Members in Practice Conference and it was obvious that he, and his company, Efficient Portfolio are the good guys in IFA world. Their focus is on establishing what their clients really need, rather than what they can sell to them. Charlie talked about their passion for helping clients achieve a long and fulfilling retirement, funded effectively and, surprisingly for an IFA, with the focus on physical health as well as financial health."

Fiona Bevan, Bevan Financial Management Ltd



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“Charlie gave an engaging and insightful talk; it was exactly what we were looking for and we appreciated his efforts in tailoring it to all of our staff.”

London Vision Clinic

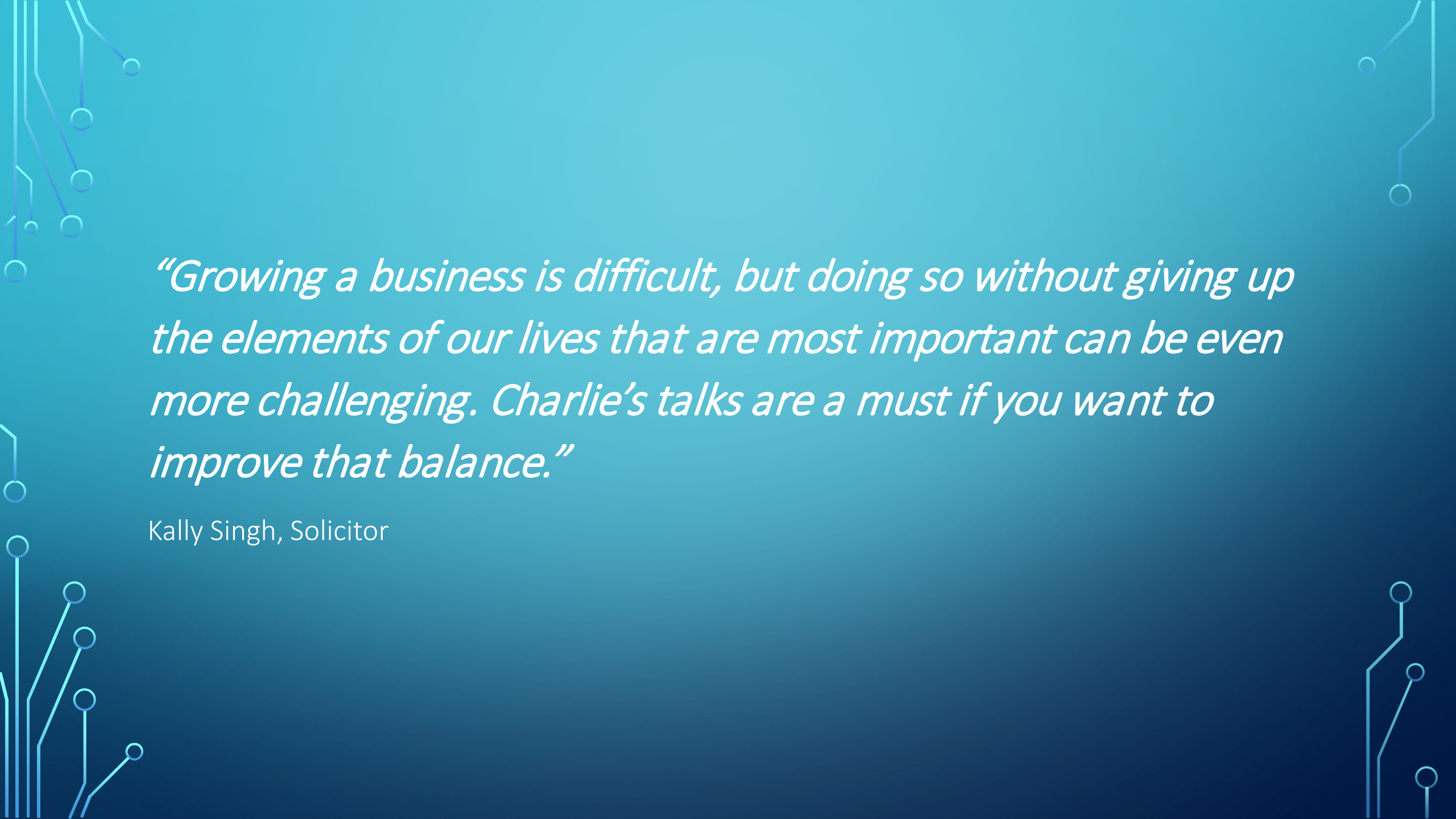
ABOUT CHARLIE READING: TRIATHLETE AND IRON MAN

When Charlie isn't working with individual clients, or teaching from the stage, you are most likely to find him competing in some of the world's toughest sporting challenges.

Over the last few years, health and wellbeing have become paramount to Charlie's personal sense of happiness. Charlie is a firm believer that there is no point in amassing wealth if you don't have the health to enjoy it. He also knows that it is crucial to fill your time with what you love, and to continually push your own boundaries.

In the last 5 years alone, Charlie has taken part in the gruelling 142-mile Dragon Ride, the Brighton Marathon, The Vitruvian Triathlon and Italy's Iron Man, which he did in aid of the Motor Neurone Disease Association.



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“Growing a business is difficult, but doing so without giving up the elements of our lives that are most important can be even more challenging. Charlie’s talks are a must if you want to improve that balance.”

Kally Singh, Solicitor

SPEAKING TOPICS

Marketing Yourself as the Expert

7 Steps to Financial Freedom

The 3 Principles of Entrepreneurial Happiness

Ironman Business Tactics

Leaving a Legacy

Creating the Dream Retirement

Financial Planning for Entrepreneurs

5 Steps to a Better Work/Life Balance

From Advice to Planning



“Charlie is one of the speakers I have used to take our teams to new limits. I have personally been inspired by Charlie as a speaker in Miami where I have used some of his messages to take my netball coaching and financial services business to new levels.

If you’re looking for a speaker to inspire you or your team Charlie is definitely not to be missed. Charlie will make you realise you have so much more to tap in to. Thank you Charlie for you have done.”

Neil Flint

EXISTING EVENTS

Charlie runs seminars and workshops throughout the year like:

The Trusted Team Virtual Taster Workshops:

<https://thetrusted.team/virtual-workshops/>

The Dream Retirement Dinner:

<https://www.efficientportfolio.co.uk/events/the-dream-retirement-dinner/>

The Leaving a Legacy Lunch:

<https://www.efficientportfolio.co.uk/events/the-leaving-a-legacy-lunch/>

The Entrepreneurs' Guide to Financial Planning:

<https://www.efficientportfolio.co.uk/events/the-entrepreneurs-guide-to-financial-planning/>

He also has a free online series called The Wealth Workshop:

<https://www.efficientportfolio.co.uk/events/the-wealth-workshop/>



"I am writing this testimonial for Charlie as he is one of the best speakers I have seen. His content is always interesting & relevant. Charlie's talks are delivered in an engaging way and he is one of those speakers you love to listen to.

His presentations are always bursting with high-energy and packed with unique ideas and real-life examples that will leave your audience inspired.

Gary Metcalf

Wealth Manager, Gemini Wealth Management

As an expert in his field, Charlie is often asked to appear on national TV and radio, and regularly contributes to local and national publications.



[Click to watch](#)



[Click to listen](#)



"I am thoroughly impressed by the depth of insight and practical wisdom Charlie shared. His presentation was a masterclass in strategic thinking and execution. His expertise was communicated with clarity, making complex concepts accessible to all levels of audience members.

What truly set Charlie apart was dynamic speaking style.

He maintained a perfect balance between enthusiasm and gravitas, capturing and holding the audience's attention effortlessly.

The pacing was impeccable, ensuring that each point was delivered with impact, leaving a lasting impression.

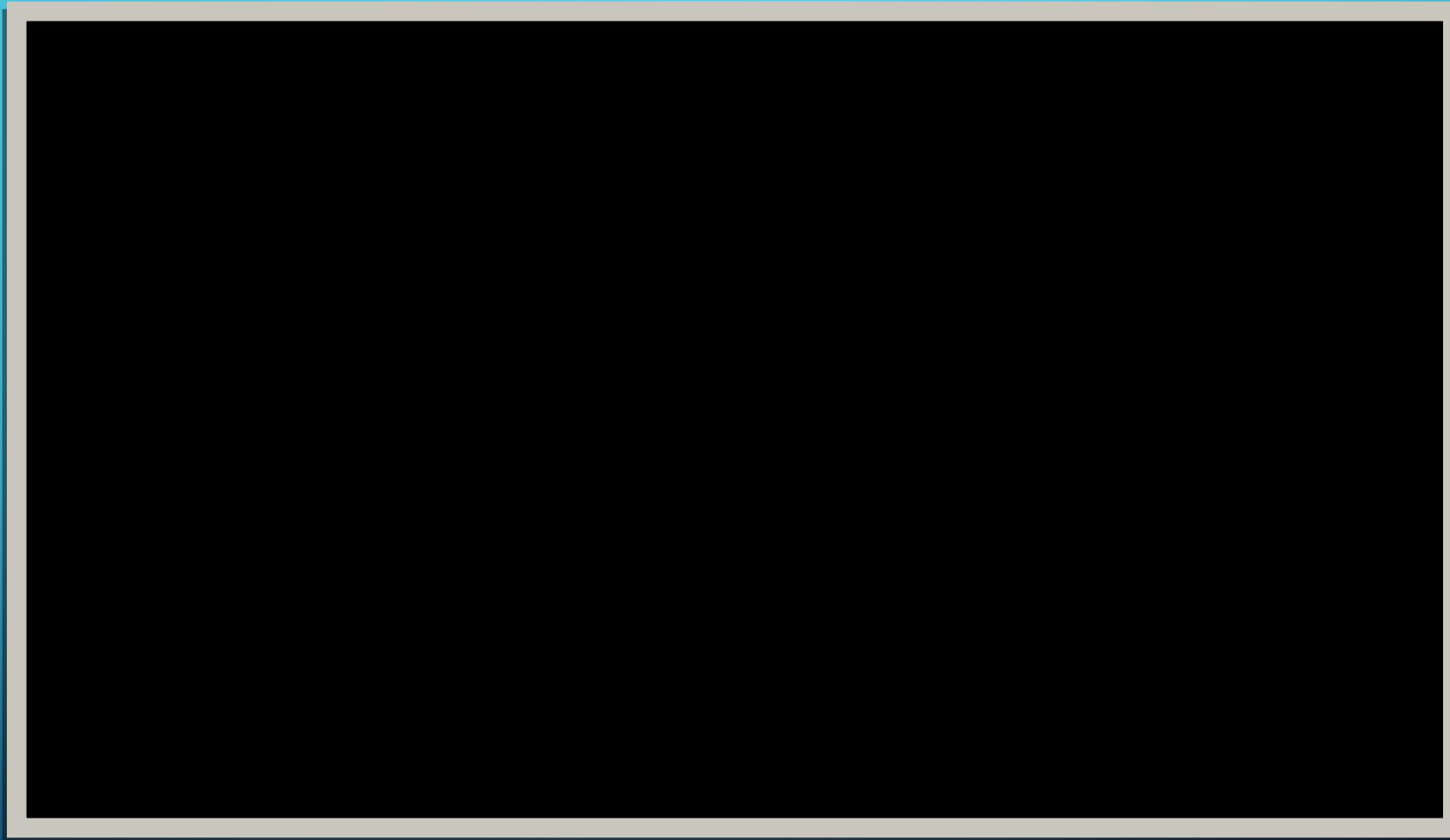
Furthermore, Charlie's interactive approach was a breath of fresh air. He encouraged audience participation, fostering an environment of active engagement and learning. This not only kept the audience involved but also provided practical takeaways that could be applied immediately.

In conclusion, Charlie's presentation was nothing short of exceptional.

I left the session feeling motivated, empowered, and armed with valuable insights to implement in my own professional journey. I wholeheartedly recommend Charlie as a speaker who can inspire and equip audiences with the tools for success in the competitive world of business."

Karl Hartey
Hartey Wealth Management

WATCH CHARLIE SPEAK AT MDRT MIAMI



to 11,000 people from around the world

Dream big, set goals, take action.

We are all aware that in order to achieve goals we need to do these points that Charlie raises.

However, in his presentation Charlie takes us step by step through his journey of what seemed to him initially impossible to helping us start our journey of what is possible and achievable.

This, he explains, will be with the help of his “Fab Five” action tools, which guarantee accountability and success.

A must see presentation, brimming with ideas, activities, motivation and a new refreshing look at goal setting.


As Charlie points out: We need to slow down ...to go faster.

Helen Jenkins Dip PFS Dip LS & Jayne White Dip PFS
Inspiration Wealth Management Ltd

Charlie also produces a huge amount of free online content to help educate people about their finances and entrepreneurship and produces a weekly update called The Friday Footnotes.

Click each icon to learn more



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“Charlie’s stories are both inspiring and encouraging; the system powerful and simple; and the exercises life-changing. I urge you to not just listen to what he has to say, but action it too.”

Kieron Malloy, Entrepreneur & Business Consultant



I had the pleasure of attending Charlie's talk on "Ironman Tactics" in Nashville and came away inspired, and with pages of actionable takeaways. Charlie was engaging and thought provoking, and epitomises the definition of 'growth mindset' which is central to his mission. I have been bowled away with my results since successfully implementing the systems that Charlie introduced. I now feel more confident in my business, my support team, and tackling my scary goals.

Gareth Chalk, Independent Financial Adviser

WANT TO LEARN MORE?

Get in touch on 01572 898060

Visit www.charliereading.com

email Charlie@efficientportfolio.co.uk

