



INNOVATIVE. INSPIRATIONAL. IMPASSIONED.

Speaker. Entrepreneur. Author

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



Charlie Reading is a serial entrepreneur, acclaimed speaker, and four-time author, celebrated for his strategic insights into financial planning and business growth.

Founder of the award-winning Efficient Portfolio Wealth Management, amongst his many business ventures Charlie now leads The Trusted Team, a coaching business that helps business owners and professionals achieve growth while working less and enjoying more.

As host of the Business of Endurance podcast, he draws powerful lessons from the world of endurance sports to empower and inspire. His books, including "Entrepreneurial Happiness" and "The Dream Retirement," reflect his dedication to helping others find balance and fulfilment.

He has finished multiple Ironman races, including arguably the toughest single day race on the planet, The Ironman World Championship in Kona, Hawaii, Charlie embodies the spirit of endurance in his professional and personal pursuits.

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 300 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 and my own experience. 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 growing the business by 50% each year, 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.”



“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. 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 Ironman and family man. He exudes the whole person concept better than most people I know. I wouldn’t hesitate to have him speaking at any event we were running.”

Sarah Hogan FPFS, 2nd April 2023

Company Director, KBA Financial

Why Charlie Reading?

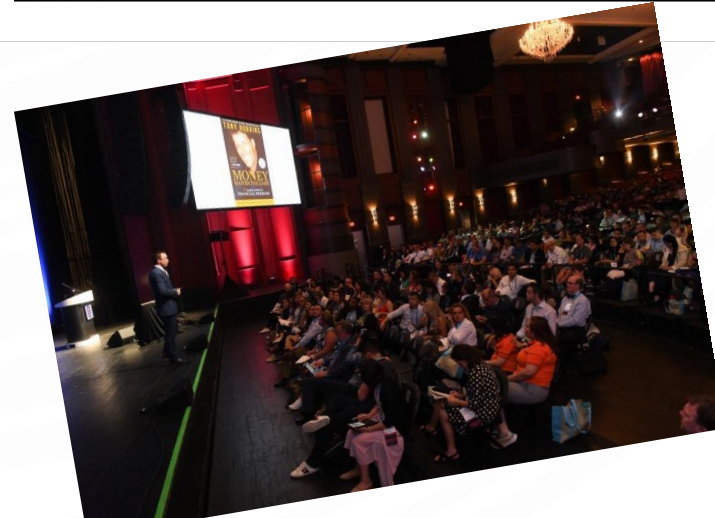
Charlie was generating 50% year on year growth at Efficient Portfolio while taking 3 months of every year off, and merging business with fun; all whilst writing 4 books, completing multiple Ironman's and travelling the world with his family. People believe they have to strive to achieve success; it is actually how smart you work, not how hard you work, that drives your success in both business and life.



ABOUT CHARLIE READING: AUTHOR AND SPEAKER

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

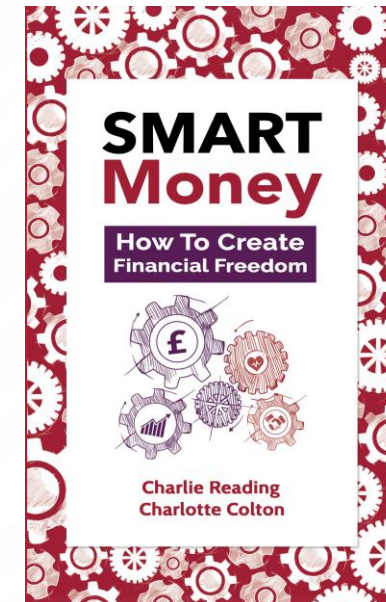
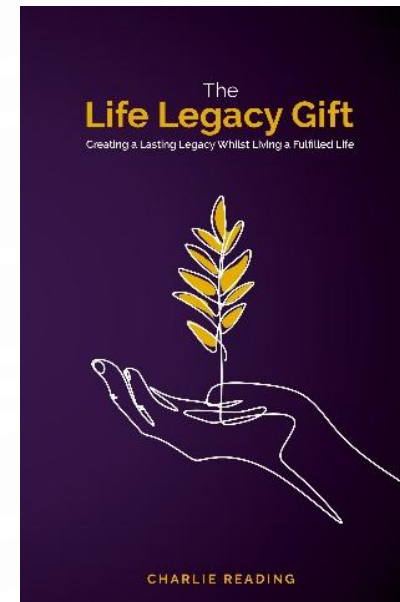
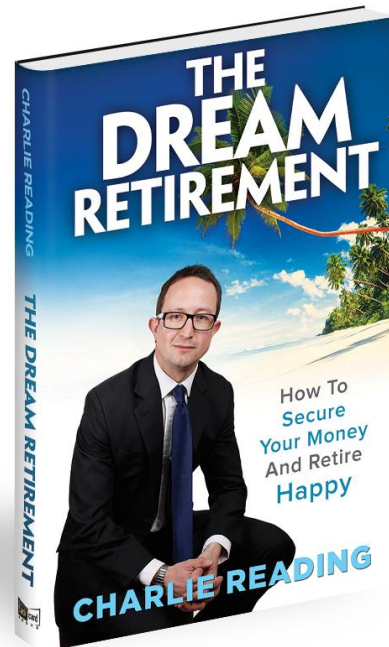
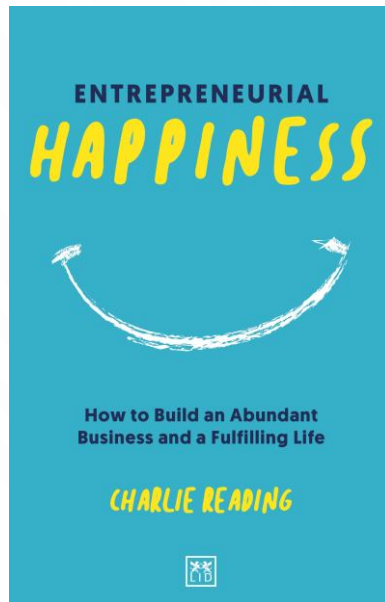
Charlie is also an award winning speaker and has taken to the stage with some of the best-known global experts at events such as MDRT in Miami, Nashville & Singapore, The PFS Conference, the National Achiever's Congress and the CIMA Annual Conference.



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, 14th May 2023

Wealth Manager, Gemini Wealth Management

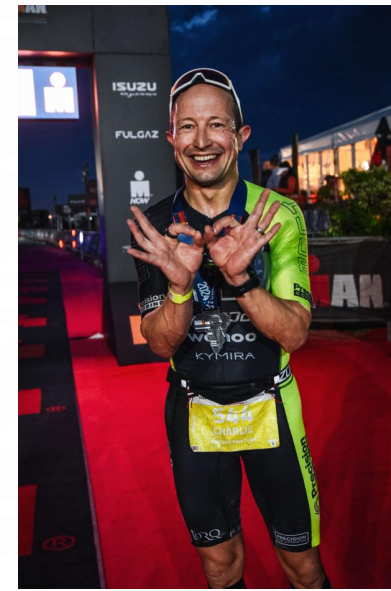


ABOUT CHARLIE READING: TRIATHLETE AND IRONMAN

When Charlie isn't working or with his family, you are most likely to find him competing in some of the world's toughest sporting challenges.

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 recent years, Charlie completed 6 Ironman's, including The Ironman World Championships in Kona, Hawaii. He's completed ultra-marathons and extreme cycling adventures like the gruelling 142-mile Dragon Ride, many of which he has done to raise money for charities such as Motor Neurone Disease Association.





**BUSINESS OF
ENDURANCE**

*Business and life lessons from the world of
endurance sport*

Charlie Reading
and Claire Fudge

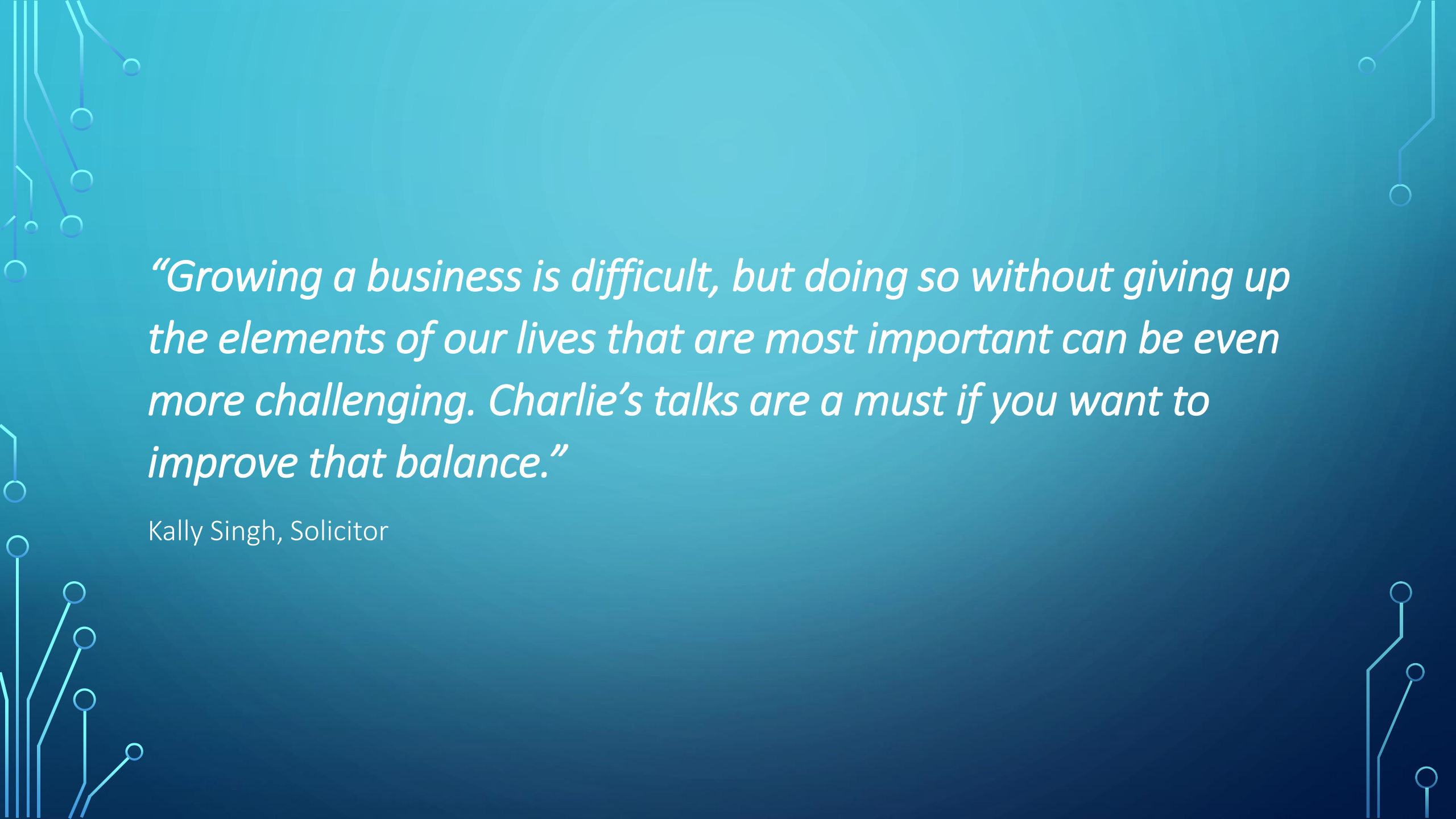


**FROM TERMINAL TO
TRIATHLON**

MARK BRYANT

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The background is a solid teal color. In the corners, there are decorative white line art elements resembling circuit boards or neural networks, with lines and small circles connecting them.

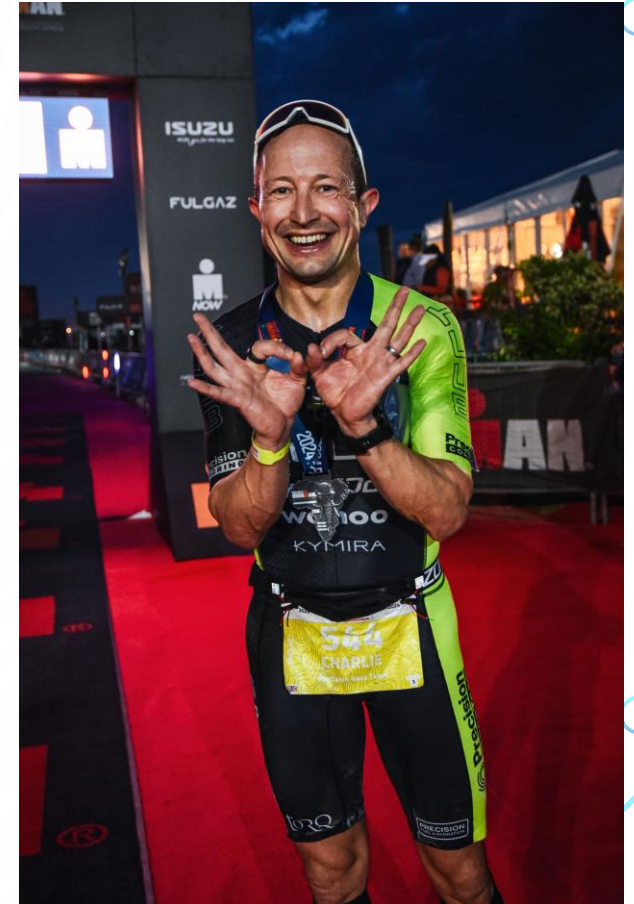
“Growing a business is difficult, but doing so without giving up the elements of our lives that are most important can be even more challenging. Charlie’s talks are a must if you want to improve that balance.”

Kally Singh, Solicitor

SPEAKING TOPICS

Ironman business tactics: Business & Life lessons from the world of Endurance Sport

Ironman Business Tactics: Lessons from the World of Endurance Sport" reveals how principles from top endurance athletes can transform your business and personal life. Drawing on insights from my podcast The Business of Endurance and my experience as a five-time Ironman finisher and ultrarunner, and Ironman World Championship qualifier, this talk offers actionable takeaways for building resilience, strategic planning, and maintaining focus. Discover how the dedication and discipline of endurance sports can inspire attendees to achieve peak performance in their careers and personal endeavors.





SPEAKING TOPICS

The AI Advance:

Your Greatest Threat & Your Greatest Opportunity

The threat of losing your job to AI is less imminent than losing it to someone adept in leveraging AI. By decade's end, service businesses will either have integrated AI or succumbed to those who did. The question is, which AI tools can you harness now to optimize you and your team's performance and outpace the competition, instead of being left in their wake?

SPEAKING TOPICS

Magnification Mastery:

Helping more people in less time

Transform your service-based business with "Magnification Mastery: Helping More People in Less Time." Traditional one-on-one client approaches limit your reach and impact. Imagine amplifying your expertise to assist multiple clients simultaneously within the same time frame. This powerful strategy turns your one-on-one services into scalable, one-to-many solutions. Join me to discover how to multiply your impact, extend your reach, and elevate your business to new heights.



SPEAKING TOPICS

The Fee VALUE Framework: Deliver more value whilst earning more

Elevate your business with "The Fee VALUE Framework: Deliver More Value Whilst Earning More." This approach helps you build a value-based fee model, ensuring you attract ideal clients who appreciate your worth. Learn to effectively communicate your value, justify higher fees, and enhance client satisfaction. Join me to discover how to set a minimum client standard, work smarter, and watch your business thrive by delivering exceptional value while earning more.



SPEAKING TOPICS

The Culture Cultivator: Retaining culture in a hybrid world

Discover how to maintain and enhance your company's unique culture in the evolving hybrid work environment with "The Culture Cultivator: Retaining Culture in a Hybrid World." This innovative approach helps business leaders define and leverage their core values, beliefs, and behaviors, crucial for attracting and retaining top talent. Learn strategic methods to foster a cohesive, productive team that thrives both remotely and in-person, ensuring your business stands out and succeeds in today's competitive landscape.



SPEAKING TOPICS



Marketing Yourself as the Expert: How and Why to create Positioning as a Professional

Unleash the power of attraction in your business! Become 'the expert' everyone seeks — the key to having a stream of perfect clients racing to your door. Picture this: when they're ready to leap, you're the only name on their minds. With The Expert Lead Accelerator, ignite your path to being the undisputed go-to guru. Make your brand the singular destination for your dream clients!

SPEAKING TOPICS

The Dream Retirement: Enough money to sleep, purpose to rise and the health to enjoy

Transform your retirement into a vibrant new chapter with "The Dream Retirement: Enough Money to Sleep, Purpose to Rise, and the Health to Enjoy." Learn how to effectively manage your finances, ensuring your money works hard for you and lasts throughout your retirement. Discover strategies to structure your time and boost your wellbeing, creating a balanced, fulfilling lifestyle. Join me to unlock the secrets to a financially secure, purposeful, and healthy retirement, so you can live your dreams to the fullest.



Living a Limitless Life:

Doing what the top 1% do

Unlock your potential with "Living a Limitless Life: Doing What the Top 1% Do." Discover how to break through barriers, grow your business exponentially, and enjoy life to the fullest. Learn from top entrepreneurs who blend work with passion, achieve extraordinary growth, and maintain a healthy work-life balance. Join me in this interactive workshop to set actionable goals, boost your income, and ensure your business thrives while you work less and enjoy more.

SPEAKING TOPICS



SPEAKING TOPICS

The Happy Week: Plan your time like a pro

"The Happy Week: Plan Your Time Like a Pro" provides a structured framework for short-term planning and daily mindfulness. Learn to set intentional goals, prioritize activities that align with your values, and develop habits that foster happiness and fulfillment. Join me to master the art of purposeful, balanced living, ensuring each week is productive and joy-filled.



SPEAKING TOPICS

Leaving a Lasting Legacy: How to Leave a Legacy that Matters

"Leaving a Lasting Legacy" guides you through the essential aspects of creating a meaningful and enduring legacy. This session addresses the multifaceted nature of legacy planning, emphasizing not just the financial but also the emotional and social impacts. You'll gain insights into effective communication strategies, ethical considerations, and the role of philanthropy in legacy building. We'll also delve into the practicalities of estate planning, charitable giving, and the use of trusts, ensuring you're well-equipped to realize your legacy aspirations and make a lasting impact that reflects your unique values and goals.



WATCH CHARLIE IN ACTION NOW

Here are some of Charlie's events that you can enjoy now (click the link)

Unleash the Power of AI

3 Steps to Entrepreneurial Happiness

The Limitless Life Workshop

How to write a business book



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](#)



Charlie Reading is a distinguished serial entrepreneur, dynamic speaker, and author of four insightful books. As the founder of Efficient Portfolio Wealth Management, once recognized as a top financial planning practice in the UK, Charlie's expertise in wealth management is unparalleled. Amongst his many business ventures, he leads The Trusted Team, focusing on coaching business owners to expand their businesses whilst working less and enjoying more.

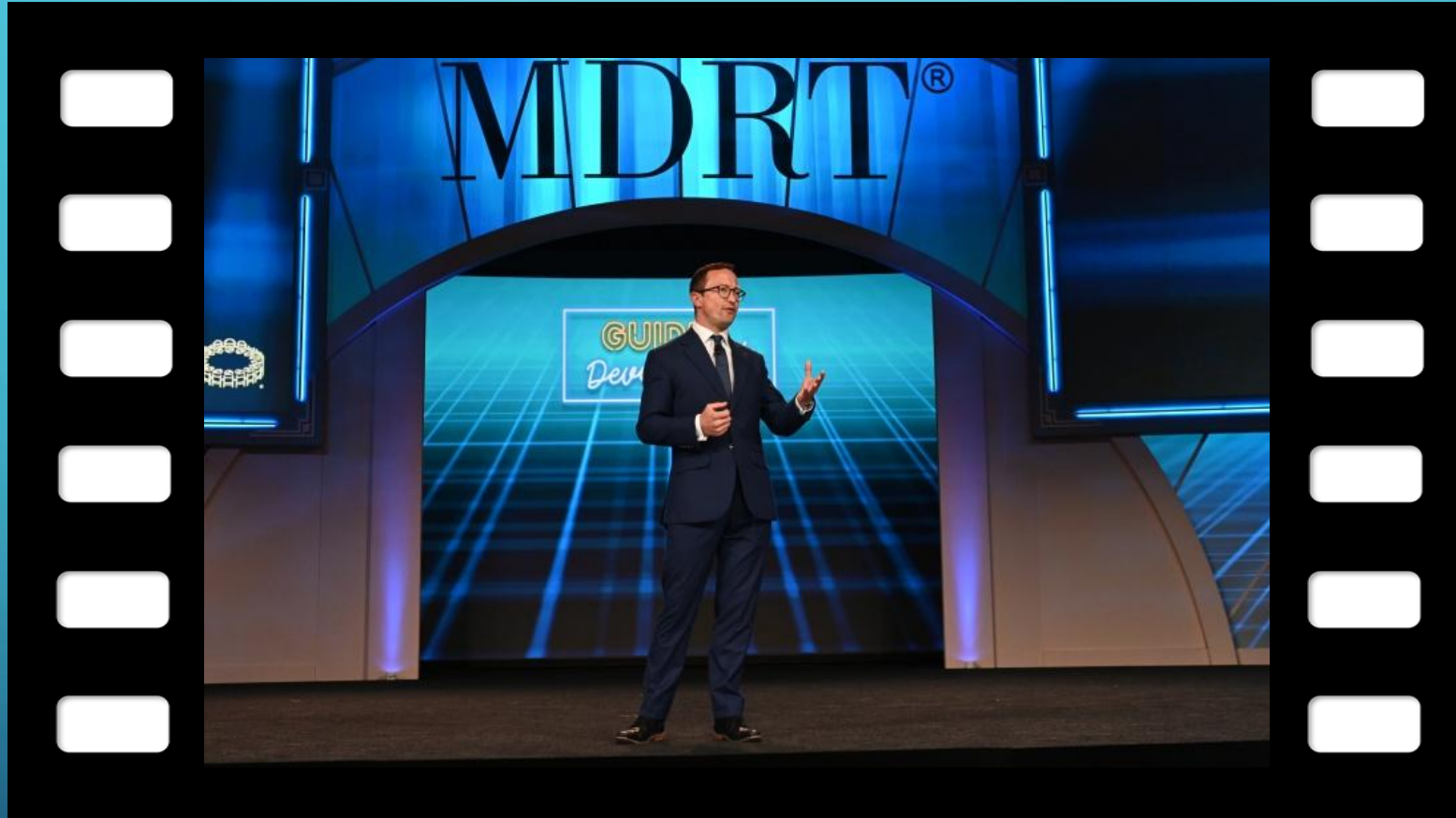
His literary contributions, particularly "Entrepreneurial Happiness" and "The Dream Retirement," are pivotal resources for those aiming to merge financial success with personal satisfaction. Through his Business of Endurance podcast, Charlie offers a platform where lessons from elite endurance sports figures transform into strategies for robust business practices and enriching personal development.

Charlie has graced numerous global stages, from Miami to Singapore, captivating audiences with his insights into achieving business efficiency and life balance. His athletic achievements as a multiple-time Ironman finisher and including arguably the toughest single-day race on the planet, the Ironman World Championships in Kona, Hawaii, mirror his business philosophies of resilience and dedication.

Offstage, Charlie treasures time with his family, exploring new cultures and underwater diving adventures around the world. His life and career are testaments to his belief in living fully, striving for excellence while nurturing the joy of life's journey.



WATCH CHARLIE SPEAK AT MDRT MIAMI



to 11,000 of the top financial from around the world

Charlie Reading has lit a fire under the students at Quinton House! I am pleased to report that many students would now like to complete an Iron man and our senior students have renewed energy for target setting, making sure those targets 'scare them but don't kill them'.

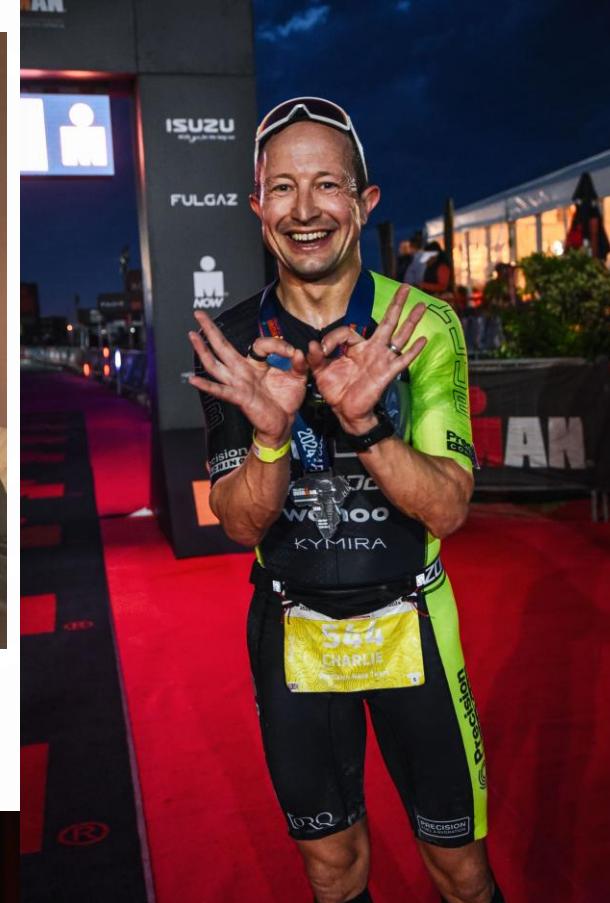
The talks worked on so many levels as he engaged with students from 12 – 18 years of age. It is wonderful to meet someone who lives their life with accountability and demonstrates a strong set of values which thread through business, personal goals, and family life.

Personally, I will take the statement 'when you step out of your comfort zone is when the magic happens' and endeavour to do so moving forward.

We will look forward to welcoming Charlie back to Quinton as the students are keen to catch up on his next adventure.

Mr Thomas Muskin, 28th September 2023
Headmaster, Quinton House School





WANT TO LEARN MORE?

Get in touch on 01572 898060

Visit www.charliereading.com

email Charlie@thetrusted.team

