



compass financial

Change on many fronts

Life at Compass Financial continues apace with the acquisition of a fourth business based in Preston, bringing with it 40 clients and adding £8 million to our company's portfolio.

On the people front, the team has been boosted by the arrival of our Senior Paraplanner Lyndsay Gray who brings with her more than 10 years experience in our industry. Read more about Lyndsay on the 'Who we are' page.

There is news too of Ceri Philipson who left us for maternity leave in April and we're delighted to report has recently given birth to a daughter. The family is doing well and we wish them all the best. Staying with family matters, Paul's son who is studying Spanish, has recently begun a one year placement with an international translation company in Barcelona and Paul's daughter is now working in PR in London, so it's all change in the Nelson household.

Best advice

We continue to listen to our customers and adapt our products and services to meet their needs in the context of a very complex financial industry. We have always been driven by what's best for our customers and, over the last couple of years, we've chosen the restricted advice model as the gold standard option for our clients.

This means we choose from a carefully chosen range of modern and efficient products and providers which are well known to us and whose efficacy is well established. Our clients have preferred this approach which is also more cost effective for them and allows us to concentrate on the quality service that we've become known for.

Of course, if in discussion with our client we feel that there might be the opportunity for a more bespoke solution for them, we have the knowledge of the market to search that out and deliver it.

Looking ahead...and across the vast open spaces of Namibia!

As the rest of the year unfolds we expect a period of consolidation for our business with the goal of recruiting another Adviser and preparing for a busy 2017 no doubt.

And preparation is on Adam's mind at the moment as he has recently agreed to take part in another expedition to raise money for the Youth Adventure Trust. In November this year Adam will be joining an elite team to complete a 54K desert trek in Namibia. Billed as the ultimate personal challenge, Adam will be climbing Brandberg, Namibia's highest mountain, walking across the Namib Desert to reach the mysterious Skeleton Coast and scaling the world's biggest sand dune. For more information on the Namibia Desert Expedition 2016 take a look via this link: www.youthadventuretrust.org.uk/desert

Have a great summer and we look forward to bringing you more Compass Financial news in due course.

Until next time!

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