



compass financial

Going from strength to strength

We're delighted to report that since our last update, Compass Financial has continued to go from strength to strength. We've had a great year with exceptional returns for our clients.

Much of our growth is the result of the confidence placed in us by our clients which extends to them recommending us to their family and friends and to associates and colleagues. We have welcomed many more new clients in recent months - both private and corporate - as a result of those 'word of mouth' recommendations - a great endorsement of our service and expertise. Our clients now include several significant local employers in the Ruthin area and we're delighted to be supporting them.

Our funds under advice now extend to £80M and, with further acquisitions planned for later this year and into 2018, the future is looking very exciting for us.

More staff and new office in Mold

Our growth has meant that we have needed to recruit more staff to help us and secure space to accommodate them, so we have recently opened a new office in Mold. Having a presence in Mold also allows us to access a broader recruitment pool with candidates for our jobs finding it easier to commute to Mold from West Cheshire, Liverpool and beyond. And of course, we do have clients in that wider North West region.

Later this month we will be welcoming a very experienced Paraplanner and an Administrator with at least one Financial Adviser joining us in May. Please look out for their profiles in the Who We Are section of the website over coming weeks.

We remain...at your service

Our team in Ruthin continue well, and we're glad to have Ceri back with us after her maternity leave. She has returned to take up the role of Operations Manager, looking after the day to day running of the business and stepping back from client contact. We wish her well in this new post.

Across both our offices, we remain ready to support you and your family with regards financial planning – from investments, to retirement considerations and wealth management. We have years of experience and access to the best planning tools to help tailor a financial plan that helps you achieve your goals and, importantly, give you the peace of mind that comes with settling your arrangements.

If you feel that we can help you, or you know someone who could benefit from our expertise then remember, we offer an initial no cost discussion to see how we might be able to support you. Please don't hesitate to call and set up a meeting or a telephone discussion.

Thank you for your interest in Compass Financial.

Compass Financial (UK) Ltd

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