



compass financial

2015 - Off to a Flying Start

We hope that the year has started well for you, and look forward to helping you get the most out of life in 2015!

That 'fresh start' feeling that many of us have at the beginning of a new year may have worn off by now, but that nagging voice urging us to 'sort out our pension/our investments/that mass of paperwork relating to our financial affairs', may not go away so quickly.

We're here to help

You can call us, email us or come and see us to ask for guidance – with no obligation. Just think, it could mean that 2015 becomes the year that you get to grips with the money side of things and have more time to focus on living your life.

Here at Compass we've certainly hit the ground running with new clients and colleagues, plans for exciting (and exhausting!) activities and the prospect of another great year.

We're delighted to welcome two new members of staff – **Richard Harris** joined us in January as a Financial Adviser and **Helen Coppack** joined us early in February as Private Client Administrator. Both appointments reflect our need for more hands on deck as we grow the business.

In recent months we've acquired a third company and increased our funds under advice to £65M. We now have around 800 clients across the UK – both private individuals and corporate and commercial enterprises. Despite our UK wide reach, the impact of our 'shop front' presence on Clwyd Street in Ruthin has meant that our local client base has increased significantly. It's great that locals come to see us - occasionally just popping in whilst they're in town for other things - and quickly discover that we're very friendly and keen to help with any financial advice they need.

All this growth has meant we're needing extra space, and so we've taken on more office accommodation opposite our existing office on Clwyd Street and hope to be settled in by the end of March. This will free up a specific client meeting area at number 26.

And that reference to exhausting activities...Adam has signed up to do two Iron Man events this year raising money for **The Youth Adventure Trust** and Ysgol Carreg Emlyn, the school attended by his two daughters. More on that in March when we'll have photos from his training schedule too!

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