



compass financial

## Punching above our weight!

As we enter the fourth quarter of 2015, it's very satisfying to look back over an excellent year at Compass Financial.

We continue to expand the business through acquisitions and this has driven us to look at what skills and capacity we need in the back office environment as well as front office support. As the business is growing, we've been nurturing our talent within the team and, as you'll see from our 'Who we are' page, staff have gained qualifications to give us even more expertise to help our clients. There have also been some changes in our line-up, with Richard leaving for personal reasons and Delyth deciding to follow a long-held dream and move on to train in midwifery. We wish them both all the very best for the future.

So, we've re-structured the business to give us the best platform from which to serve our clients: we've created another Advisory role - taken by Ceri who now works alongside Adam part of the week whilst still heading up our Paraplanning Team, as only she can. We've asked Helen to step into an Office Processes Co-ordinator role and we now have Katy Stubbings working for the business supporting the Paraplanning function. Taken together, we really have strengthened our offer for clients.

As heralded back in February, we took on more office space across the road on Clwyd Street, Ruthin this year and this has proved invaluable, giving us dedicated staff meeting areas in our new first floor premises and freeing up rooms at street level at Number 26 for client meetings.

Coincidentally, we've noticed a massive increase in walk-in business in Ruthin as people become more familiar with our brand and also we think, because the banks and building societies have ceased to offer financial advice, making our services more important than ever. From discussions within our industry, we believe that this trend to seek local financial advice is widespread across the UK but we also know that, for a relatively small business, we at Compass Financial support more clients than other businesses employing four or five times more people than we do. We are without doubt, punching above our weight!

We continue to support private and commercial clients and several of our corporate customers have kindly offered their views on our service to share on our website - look out for their testimonials.

And on the more personal front, it's been no less busy a year for all of us outside of work and especially Adam with more testing physical challenges, and inevitably more in prospect for 2016.

Until next time!

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### Compass Financial (UK) Ltd

26 Clwyd Street, Ruthin, Denbighshire LL15 1HW

T: 01824 330 010 E: [admin@compassfin.co.uk](mailto:admin@compassfin.co.uk)

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Registered office: c/o Westbury Telford Accountants, Landmark House, Station Road, Cheadle Hulme, Cheshire, SK8 7BS