

# Taking Stock Newsletter

May 2015



**Debbie Jukes**

Partner

## Spring is in the Air

Never mind spring, the summer will soon be upon us if the speed in which the last quarter has passed is anything to go by! The pace of events here at EQ makes the time fly by and, as seems to be the norm now, there has been lots of activity.

Firstly, I'm delighted to announce that we have recently been awarded the prestigious Chartered Financial Planners designation by the Chartered Insurance Institute (CII). This is the industry's gold standard for firms of financial planners and has been awarded to less than 5% of firms. Further details follow overleaf.

Secondly, I am pleased to confirm that we have managed to secure the office space next door to our headquarters to give all the team a little bit more space and to facilitate future growth. Talking of which, I would like to welcome on board Paul Lawrence and

Ben Rogers as new additions to the Client Manager team, Jonathan Rae who is participating in our graduate programme and John Hilliard as Facilities Co-ordinator to help manage the three properties we now occupy on Brooke Court.

In the outside world, it seems that it's business as usual after all of the electoral activity and unexpected outright result. We wait with interest to see who the new leaders of the defeated parties will be!

On that note, I'll leave you all to enjoy the sunshine (well, it's sunny as I write).

## Proud to be Chartered

As mentioned in the introduction we are delighted to have been awarded the prestigious Chartered Financial Planners designation by the Chartered Institute (CII). This is the industry's gold standard for firms of financial planners. It confirms that we have satisfied rigorous qualification criteria by retaining highly-qualified staff who subscribe to the membership conditions of the CII. It also involves a commitment to continuing professional development and adherence to an industry standard Code of Ethics. And with fewer than 300 firms of 'Chartered Financial Planners', it remains an exclusive and valuable distinction.

When you use a Chartered firm you are dealing with proven professionals. The CII is empowered by the Privy Council to award Chartered status, and the award is only made in deserving cases. And while Chartered titles are steeped in history, they remain the benchmark of professional excellence and integrity. Only the UK's premier financial planning firms qualify for Chartered status.



For our clients this means you can be confident that you are dealing with one of the UK's leading firms that is wholly committed to providing you with the best possible advice, service and support.

## Chester Community Support Scheme

Having had a presence in Chester for a couple of years now, we recently launched a community scheme there.

This initiative enables local charities and organisations to apply for grants of up to £500 to further support the work they are doing in the Chester area.

The deadline for the first quarter's application came to a close at the end of March. We received many inspiring and heart felt applications from a range of local charities and organisations. Overwhelmed by the responses, we couldn't possibly award just one application... So we broke our own rules and chose three!

These lucky three are:

### **Chester Gladiators RLFC**

£400: The money will help towards new coaches, equipment and players for the Under 7's and 8's teams.

### **Chester Operatic Society**

£500: They will match the funding to purchase a new electronic piano to replace their 10 year old current model.

### **Cherry Grove PTA**

£500: To transform an area of the school grounds into a fantastic nature area to provide opportunities for the children to learn about the environment.



### **Time to Apply Again!**

We have 3 more chances for you to apply this year so if you know of any organisations that could use a grant worth up to £500 to help their community, please get in touch! For more information on this and more about the Equilibrium Foundation, please visit:

[www.eqllp.co.uk/the-foundation](http://www.eqllp.co.uk/the-foundation)

## Knutsford Community Champion 2015

Once again, we teamed up with The Knutsford Guardian earlier this year to find and reward people in the local area who deserve to be crowned "Knutsford Community Champion 2015".

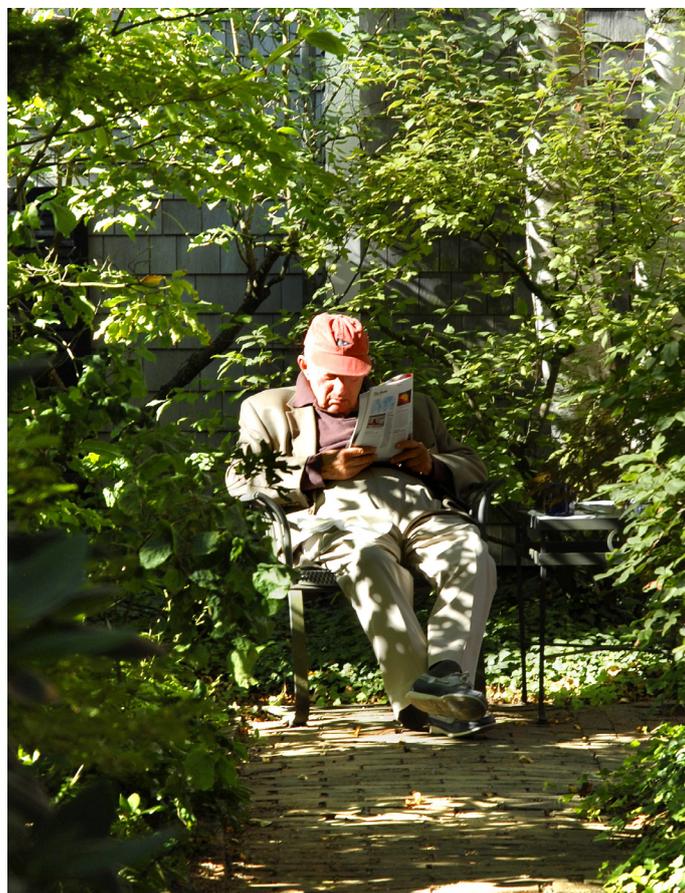
This year, local MP and Chancellor of the Exchequer, George Osborne was also able to get involved as part of the judging panel, along with Carla Flynn (Guardian Editor), Neil Forbes (Knutsford Town Mayor) and our very own Colin Lawson.

We are honoured to announce that the winner is Muriel Robinson who will receive a £250 prize and a £300 donation to her charity of choice; The Alzheimer's Society. £50 will also go to Margaret Joscelyne who is fortunate enough to know and nominate Muriel as the "Knutsford Community Champion 2015".

Muriel founded the local U3A club 10 years ago. The U3A movement offers a range of activities and outings for people who have retired and the idea to set up a branch in Knutsford was conceived over a cuppa with Muriel's neighbours.



## And the Winner is... Mike Harrison



We recently ran a photo competition inviting all enthusiasts to submit a photograph they have taken to fit one of our company motto's: "Your future financial confidence", "Life should be enjoyed" or "Making a positive difference".

We are now pleased to announce we have chosen **Mike Harrison** as our winner with his submission for "Your future financial confidence" (see featured image).

As well as featuring on the cover of May's issue of Equinox, we originally offered a prize; however Mr Harrison very kindly insisted we donate the money to the Royal National Lifeboat Institute. The RNLI founded in 1824, are an organisation of volunteers risking life and limb 24-hours a day as search and rescue support on the high seas. They have since saved over 140,000 lives and are saving more and more every year.

We would like to say a big thank you for all of the beautiful and inspiring entries we received; some of which will be featured in the upcoming issue of Equinox magazine, so be sure to take a look.

### Our Next Competition...

Leading nicely onto our next competition, we would like to invite you to get involved in thinking of a caption for the winning photograph taken by Mike Harrison. If you have any witty, insightful or comedic captions, send them to us by visiting [www.eqllp.co.uk/blog/caption-competition](http://www.eqllp.co.uk/blog/caption-competition) and you could win yourself a luxury picnic set to enjoy this summer! Please see website for terms and conditions.

## Geneva to Nice - Jason Lowe

Jason Lowe, Partner and Financial Planner here at Equilibrium, will be cycling close to 350 miles over 4 days travelling from Geneva to Nice through the Alps to raise money for charity.

It will be a tough but hugely rewarding ride; especially if he hits the £5,000 target he has set which will then be matched by the Equilibrium Foundation to make a grand total of £10,000.

Jason is raising the money for Reuben's Retreat, which is a charity in memory of a beautiful, cheeky, cuddly, loving and gorgeous chappy who sadly passed away aged 23 months. Their mission is to provide a facility in the North West of England that offers self-catering accommodation with recreational activities for families who are impacted by their children having life threatening or life limiting illnesses. They also offer counselling and support to those families who have unfortunately lost their children due to these circumstances. Since its launch 2 years ago Reuben's Retreat has helped over 100 families! Find out more by visiting [www.reubensretreat.org](http://www.reubensretreat.org).

### How can you help?

If you would like to sponsor Jason for his amazing fundraising efforts and in turn help Reuben's Retreat with their ongoing mission please



visit his Virgin Money Giving page: [www.bit.ly/JasonCycle2015](http://www.bit.ly/JasonCycle2015), or you can ask for a donation form by calling Emma on 0161 486 2250.

### Where does the Equilibrium Foundation come in?

The Equilibrium Foundation is keen to support causes in our local area, focusing on needs of the young and elderly, as well as those with whom our clients and staff have a personal affiliation. Find out more about how to double the amount you raise for charity at:

<http://eqlp.co.uk/the-foundation>

## 60 Seconds with... Paul Lawrence

It's an exciting time for us here at EQ and we are constantly looking for new talent. To learn more about one of our new starters, please read the interview below:

### Experience to date at Equilibrium...

Three weeks into my time at Equilibrium I cannot speak highly enough of the staff, and the high quality systems & processes. Everyone has been friendly and helpful any time I have needed help. Equilibrium strikes me as a place where the company does all it can to ensure people are happy in their work, which in turn leads to high quality service from staff.



### What have you most enjoyed about joining to Equilibrium?

Joining Equilibrium as a Client Manager has given me the opportunity to get back to dealing with clients more directly, with an emphasis on asset management – my favourite area of financial services.

### Tell us a bit about your background:

I have broad experience across a variety of financial services companies, having worked in Wealth Management, pure financial planning and bancassurance roles. I see this experience to date as a solid platform to enable me to specialise in Wealth Management for high net worth clients in future.

### What would you be if you weren't a Client Manager?

Having seen Top Gun far too many times, my childhood dream was to become a fast jet pilot in the RAF; but my dreams were shattered when told I was too tall.

### And finally, tell us something we don't know about you!

I can be quite clumsy. In my previous job I managed to knock myself out cold, twice in the space of a month just by walking into things and now have a Harry Potter-like lightning bolt scar above my right eye as a souvenir. I'm glad Equilibrium doesn't have any floor-to-ceiling plain glass windows or low-hanging security cameras!

---

## Land's End to John o'Groats

One of our clients David Quinn is currently on a sponsored walk to raise money for Cancer Research UK

20 years ago he walked Wainwright's Coast to Coast walk, and now that he has more time, he is planning a different Coast to Coast walk. This stroll will start at the west tip of Cornwall and finish at the northeast tip of Scotland, better known as the Land's End to John o'Groats walk. This is about 1100 miles and will take the best part of 3 months.

The journey takes in several well known paths including all or parts of the Macmillan Way, the Cotswold Way, the Severn Way, the Stafford Way, the Gritstone Trail, the Pennine Way, the West Highland Way and the Great Glen Way. There is no actual fixed route, just a start and finish point.

David was inspired to do this walk by a remarkable friend, Lissie Raine, who has been fighting bowel cancer for a long time. No one deserves to go through the pain and trauma that she and the family have had to endure over the last few years.

### Ways you can help

Donations are of course a fantastic way to help however, offers of accommodation would be very welcome from anyone on, or close to the route as 3 months of B&Bs will be quite expensive, and any money saved by this will go to the charity. To pledge your support please visit his twitter and website pages opposite:



Twitter: [@davidquinn](#)

Website: [www.lejogfurelise.co.uk](http://www.lejogfurelise.co.uk)

David will celebrate his 71st birthday whilst on the walk and according to Wikipedia, the oldest person to complete the walk was 74 (Older people may have done the walk, but not registered).

As he is walking on his own, he would be very happy for anyone to join him for a short or long period. Please support David in any way you can and spread the word, especially if he is walking through your area.

---

## Traveling Companion

A number of our widowed and/or single clients have recently commented about their difficulties in finding a travel partner in order to enjoy a holiday or an experience with. If you are in a similar position and would like the opportunity to connect with other Equilibrium clients under similar circumstances, please send us your contact details to [debbie@eqllp.co.uk](mailto:debbie@eqllp.co.uk).

We will collect the details of everyone interested and proceed further once we have gauged the interest in the idea.



**Please don't forget to get in touch if you have any comments or if there's anything you would like to see featured in the next edition of Taking Stock, e-mail me at [debbie@eqllp.co.uk](mailto:debbie@eqllp.co.uk) or call 0161 486 2252.**