

# Taking Stock Newsletter

February 2016



## Debbie Jukes

Partner

## It's flippin' February!

It feels like only yesterday that the team were preparing for our Christmas lunches and in a blink of an eye we are now in February – the month of love and pancakes! I hope that you enjoyed the festive period and that you are now well and truly settled into 2016 (and managing to keep any New Year's resolutions that you made!)

It has been a whirlwind of activity at EQ over the past quarter. From the opening of our new Chester office on 12 January to a busy events season, it has been nonstop for the team. Our 21st anniversary preparations are now well under way and look out for an exclusive save the date landing on your doorstep in mid-March. We were also delighted with another two prestigious award wins – adding an Excellence in Customer Service award and the New Model Adviser Firm of the Year to our awards cabinet.

Outside EQ, there has been an abundance of headlines in the media surrounding the volatility in the markets. Volatility is a fact of life in the stockmarket. Whilst this does not mean we are not being cautious and focusing just as much on the risks to your portfolios as the potential returns, we feel that the current situation presents us with opportunities. To keep up to date with our outlook and views, I would recommend reading the excellent blogs from our investment team that we regularly post on our website at [www.eqlp.co.uk/blogs](http://www.eqlp.co.uk/blogs).

In the meantime, for all of our community news and updates I hope you enjoy this issue of Taking Stock. As always, I would love to hear your feedback and comments so do feel free to drop me a line with your thoughts at [debbie.jukes@eqlp.co.uk](mailto:debbie.jukes@eqlp.co.uk).

## Equilibrium client raises over £9,000 for charity

David Quinn from Hazel Grove, Stockport, conquered a UK-spanning trek from Land's End to John O'Groats to raise over £9,000 for Cancer Research UK. David was inspired to undertake his mammoth expedition by a special friend, Lissie, who had bowel cancer.

Sadly, Lissie died while David was tackling his 1,100 mile hike from one end of the country to the other, meaning David needed a short break to attend her funeral. David went on to finish the walk in Lissie's memory, raising an impressive £4,591.13 for Cancer Research UK, a total which was then match funded by Equilibrium meaning the charity received £9,182.26 overall.

Speaking about his journey David said: "I would like to thank all the wonderful people I met on my journey who made it so special - people who walked with me or who provided accommodation, food and refreshments or donated to the cause. The journey was difficult at times, but the great support and encouragement I received really kept me going. To raise such a large amount for a charity which is close to many people's heart is fantastic. Looking back, I'm glad I was able to complete

the journey, it's an experience I will never forget and I can't thank Equilibrium enough for the support they gave me."



Debbie Jukes presenting David Quinn and Jack Leetch from Cancer Research UK with the donation.

## New EQ arrival!

Senior Client Manager, Catherine Dooley, is proud to announce the birth of her little boy. Baby Austin arrived a little earlier than expected on Boxing Day and weighed in at 5lb 6oz. Both mum and baby are doing very well!



## We scoop another couple of awards

We triumphed at the North East Cheshire Business awards, picking up the prize for 'Excellence in Customer Service' – an award recognising exceptional customer service, which is central to our ethos.

We were also delighted to be crowned the best firm in the North for the second consecutive year, winning 'Firm of the Year' at the New Model Adviser awards. This will be the third time that we have claimed the award and we are proud to be recognised once again as the standout wealth management firm in the North.

## Our new Chester office is now open

We officially opened for business on 12 January at our new Chester office at Chester Gates Business Park. If you would like to meet with your adviser here please just let us know when arranging your next meeting.



Andrew Hirst and Jason Lowe accepting the Firm of the Year award.



## Making a positive difference with Cash for Kids

We are delighted to share that our clients and the EQ team raised a total of £4,276.10 to buy presents for Key 103's Mission Christmas. We also made donating a gift even easier by becoming an official drop-off point for gifts and received lots of presents under our Christmas tree to give to disadvantaged children.

This meant that in total around 122 children in the Manchester area received a selection of presents at Christmas, who might not have received a gift otherwise. As well as donating presents, some of the Equilibrium team also spent a couple of days at Mission Christmas HQ to help sort and bag the presents into age categories to send to the children.

A big thank you to everyone who either dropped off a present with us or donated money during our Christmas parties.



Members of the EQ team helping at Mission Christmas HQ.

## Rob returns from his shark adventure

In the last Taking Stock you may remember Senior Client Manager Rob Ellis was about to head off to Mossel Bay in South Africa to take part in a shark conservation volunteer project.

We are pleased to say that Rob has safely returned from his shark experience! Rob commented: "Seeing the very first shark emerge through the water was by far the most memorable and favourite part of the trip. Overall, it was just an incredible experience and I'm thrilled to have been a part of it."



← Taken on a tagging trip, the shark held is a bronze whaler shark which was caught on hand lines. The shark was promptly released after being measured and having a tag inserted behind the dorsal fin.

↓ A photograph from Rob's first trip out on 'shark warrior', the picture shows one of the sharks coming close to the boat to investigate the bait! 'Speckles' is well

known to the crew and has been visiting the boat since 2011. She is around 3.6m long, which is the biggest they are known to grow in the Mossel Bay area before they move on.



## An evening of classical music with the Alderley Edge Orchestra

On Saturday 5 March, Equilibrium client Paul Dawes plays the Hummel Trumpet Concerto, as well as Symphony No. 3 by Schumann and Rimsky-Korsakov's The Snow Maiden with the Alderley Edge Orchestra. The concert will take place at Alderley Edge Methodist Church and starts at 7:30pm.

Tickets are £10 for adults and £1 for under 18s. To find out more information visit [www.aeorchestra.org.uk](http://www.aeorchestra.org.uk) or call 0161 439 6277 to purchase tickets.



As we continue to strive to make a positive difference to the local community in our 21st year of business, the EQ team will be doing some volunteering days with charities. If you know of any organisations that need volunteers to give time please get in touch with Fiona at [fiona.bousfield@eqllp.co.uk](mailto:fiona.bousfield@eqllp.co.uk).

## Events Calendar

### Managing Risk & Meeting Expectations

- 23 February** The Mere, Mere, Knutsford WA16 6LJ
- 2 March** DoubleTree by Hilton, Hoole, Chester CH2 3PD
- 9 March** Mottram Hall, Mottram, Mottram St Andrew SK10 4QT

Demand is expected to be high so if you would like to attend an event please RSVP as soon as possible to avoid disappointment. To reserve your place please email [rsvp@eqllp.co.uk](mailto:rsvp@eqllp.co.uk) or call Emma on 0161 486 2250.