

Taking Stock Newsletter

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Swing into spring

Well, it seems that spring is finally here! It has been lovely to see a little more sunshine and the flowers blossoming over recent weeks – let's just hope it holds out!

2016 is certainly shaping up to be a busy one so far. We have continued to expand the team and welcomed a trio of new client managers to ensure we continue to deliver a personalised service.

With it being our 21st anniversary year, there has been a lot of work from the team to plan our special birthday celebration at Tatton Park on 25 November. We have also set ourselves the ambitious target to raise £10,500 for charity, which will be matched by The Equilibrium Foundation to make a total of £21,000 – meaning the team have been working hard arranging a lot of internal and external events!

From a personal point of view I am proud of being at Equilibrium for 15 years. Looking back over the years it has been fantastic to see our growth - and I cannot believe how time has flown!

Outside of EQ, it seems that we have been hit by EU mania with the upcoming referendum, Donald Trump is still making headlines (perhaps for all the wrong reasons!) and a little closer to home, Leicester City were the surprise Premier League champions.

For some light-hearted relief, read on to find out about all of our community news and updates in this edition of Taking Stock. As always, I would love to hear any feedback or comments you have so do feel free to drop me a line at debbie.jukes@eqllp.co.uk.

Congratulations to Lucy and Darren!

Our Head of Training & Development, formerly Lucy Woolrich, recently tied the knot. A huge congratulations to the new Mr & Mrs Moss – we wish them all the very best for the future!



New arrival!

Client Manager Ann Trapp is delighted to announce the birth of a little baby boy.

Jack Trapp was born in early February weighing a tiny 5lb 14oz. Both mum and baby are doing well.



Fantasy Investment League results

We recently announced the results of our annual fantasy investment league competition.

This year Alderley Edge School for Girls (AESG) and The Queen's School in Chester took part. With an investment pot of £300 each, the students aimed to buy low and sell high on the stock markets. Caitlin Lewis was the winner from Queen's, making a 5.76% profit after heavily investing in the US market. Lydia Pope beat tough competition from her classmates to come out top at AESG.

Caitlin and Lydia both won an Apple Watch for their achievements and each school received £250 for taking part in the competition. The total profit from all the girls taking part at Queen's was £123.34, which is being given to YoungMinds, the school's chosen charity. Lydia Pope from AESG will be receiving her prize this week.

Brendan Durkan, Head of Economics and Business at The Queen's School, said: 'We have really enjoyed taking part in the Equilibrium Fantasy Investment League this year – it's been an invaluable way of helping to stoke up even more interest in business and economics within the school and it's given the girls a true insight into how stocks and shares operate in the real world. The girls really engaged with the competition and we can't wait to take part again next year.'



Investment Analyst Neal Foundly presents Caitlin Lewis with her prize

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@eqlp.co.uk.



Expanding the EQ team

We recently welcomed a trio of recruits to our client manager team.

Katy Littler previously worked on projects for Barclays, Deutsche Bank and UBS and brings expertise in pensions, investments, tax calculations and client relations. She is joined by Helen Johnson who brings 15 years' corporate experience in pensions and investments and Vanessa Carey, an expert in equities. We would like to extend them all a very warm welcome to the team!



(Left to Right) Vanessa Carey, Helen Johnson and Katy Littler

Happy EQ birthday to Barney!

Congratulations to Client Manager Barney Kilroy who celebrated being at Equilibrium for 10 years this month. Barney has made a huge impact to the business over the years and we would like to thank him for all of his hard work and commitment.

We are proud of our staff retention rate at 92% and are looking forward to celebrating more milestones with the team.



Calling all young artists!

As part of our 21st anniversary plans, we are hosting a competition for primary school children to design a picture to feature on our 21st birthday card.

How to enter

- Entrants should draw a suitable birthday themed picture to be used on the front of a postcard. All entries should be hand-drawn on one sheet of A4 paper.
- The competition is open to all children aged 4-11.
- The closing date for entries is Friday 3 June. All entries should include name, age and contact details of a parent/guardian (contact details will only be used to arrange the prize if successful). Completed entries should be posted to Fiona Bousfield at Equilibrium. For more information please go to www.eqllp.co.uk/blog/21st-birthday-card-competition

The prize

The winner will receive...

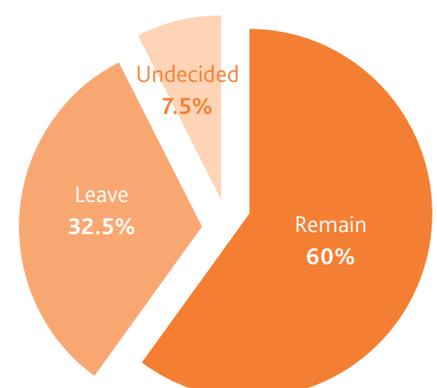
- A Kindle Fire 8
- The picture will be professionally printed and the card will be sent to approximately 8,000 houses across Cheshire – plus the winner will receive a special framed copy!



Our Brexit vote

With the referendum approaching we thought we would hold our own vote on whether we should stay in Europe.

Every EQ team member voted and here are the results:



60 seconds with... Colin Lawson



We ask our Founder and Managing Partner about the history and growth of the business over the past 21 years.

What led you to launch the business?

I started my financial services career at Norwich Union where I worked in a number of different departments to gain experience in the industry. I then moved to Britannia Life as a consultant, where I had the opportunity to gain a good understanding of how IFAs operated – seeing how badly some of them did it I thought (perhaps with a little youthful naivety!) that I could do better, so I took a leap of faith to start my own business.

What were the first years like?

It was certainly a challenging time. I made myself put my suit on each morning to walk into the 'office' (my back bedroom) to start the day. It was a great time to learn the ropes, to grow and to really get a full understanding of the business.

What was a normal day like?

Every day was incredibly varied – it would usually involve prospecting, creating presentations, marketing campaigns and attending client appointments. I was always trying to get the most out of my days so they would often start at 8am and finish at 11pm.

How have things changed today?

A usual day for me is looking after the clients I still see, leading the adviser team and supporting the advisers on some of the more complex cases. I

take an overall top-line view of the business and where we are heading. My days are still incredibly varied and to be honest no two days are the same!

What gets you out of bed in a morning?

What really floats my boat is when clients make a decision that is better for them – whether that's spending more money on themselves, moving house or supporting their family. If through the process of what we do we can create confidence for our clients and get them to do something different with their money then that's fantastic.

What are you proud of?

One of my proudest moments is without a doubt employing my first staff member – and we are now a team of 57! We have a great team of people and we look after our clients. Over the years I genuinely believe that we have put people over profit and that we always try to do the right thing by our clients and for the team overall.

If you could sum up the journey of Equilibrium in one line, what would it be?

It's been fun!