

Taking Stock Newsletter

November 2015



Debbie Jukes

Partner

As the autumn leaves fall...

With the clocks turning back a week or so ago, the dark nights are drawing in and it seems autumn is upon us! Here at EQ we enjoyed some spooky treats in the office for Halloween and are looking forward to wrapping up warm for bonfire night fireworks.

However, no sooner than the first autumn leaves fell the charmingly festive shop window displays have appeared, and as the saying goes...it's never too early to be thinking about Christmas! I hope that you have now received your invitation to our Christmas lunch and that you are able to join us.

It has certainly been a busy few months at EQ. Our team culture is one of the fundamental reasons why I love what I do so much, and I'm pleased to say that we have welcomed no less than seven new starters to the EQ team over this past quarter! Additionally, we have continued to win industry awards in recognition of the service we provide, and are immensely proud of Colin winning 'Financial & Professional Services Entrepreneur of the Year 2015'.

All the EQ team are also excited to begin preparations for our 21st Anniversary next year. We would love our clients to be involved so if you have any photographs of EQ events (whether from back in the noughties or from more recent years) please send them to us at marketing@eqllp.co.uk.

Outside EQ, it has undoubtedly been a period of volatility across the stock-markets over recent months, Jeremy Corbyn's landslide victory in the Labour leadership contest certainly surprised some and the seemingly ever-lasting "In-Out" question of UK membership of the EU continues to hold strong (and I'm sure will do over the next year or two in the build up to the planned referendum!)

For some more light-hearted reading I hope you enjoy this issue of Taking Stock where you can find all the latest news from the EQ community. As always, I would love to hear your feedback and comments so please do drop me a line at debbie.jukes@eqllp.co.uk.

Rob's shark adventure in Mossel Bay

On 1 November this year, Rob Ellis (Senior Client Manager) headed to Mossel Bay, South Africa to take part in a shark conservation volunteer project. Mossel Bay is situated on the scenic Garden Route in the Western Cape and is well known for having one of the highest White Shark concentrations along the South African coastline, and in the world.

The program is structured over 27 days and is open to anyone with an interest in sharks, and to those who wish to be involved in something rewarding, educational and exciting. Participants will be involved in shark data collection (via surface viewing, cage diving, tagging and sampling), marine conservation and beach clean-ups, crew duties on the boats, and delivering safety briefings to tourists.

Rob commented: "Conservation is something that I am very passionate about, and marine conservation in particular. The generous holiday entitlement at Equilibrium has allowed me to embark on something that I never thought would be possible whilst working, and I very much look forward to sharing my experiences with everyone on my return."

Following the completion of the project, Rob plans to spend a further week on safari, exploring South Africa's vineyards and visiting friends in Dubai on the way home.

Good luck to Rob on his exciting adventure and keep your eyes peeled for his pictures in the next issue of Taking Stock!



It's never too early to be thinking about Christmas...

You should have recently received your invitation to one of our Christmas parties. Demand is expected to be high so please RSVP as soon as possible to avoid disappointment. We look forward to seeing you there for a three-course Christmas lunch with a glass of wine or two.

We will again be supporting Key 103's Cash for Kids Mission Christmas for the 4th year running. Cash 4 Kids is a charity that donates toys and gifts to the less fortunate children of Greater Manchester at Christmas. If you would like to support please bring a gift with you to our Christmas party. To find out more information go to www.eqllp.co.uk/blog/cash-4-kids-mission-christmas.

If you have not received your invitation yet please either email Emma at emma@eqllp.co.uk or call 0161 486 2250.



Expanding the EQ team

It has certainly been a busy few months for us at EQ and we are delighted to welcome several new colleagues to the team.

Kai Ansari and Matthew Wincott have joined us as client managers, and we are also pleased to have expanded our new graduate programme with Tim Latham and Jack Geary recently starting the two-year programme as trainee client managers.

We also welcome two new members to our marketing team with Paul Davis as Graphic Designer and Fiona Bousfield as Marketing Communications Executive. Sarah Winthorpe also joins our finance and accounts team as Finance Manager.

A warm welcome to all of our new colleagues! You can find out more about our new starters on our refreshed staff profile section on our website – www.eqlp.co.uk/about-equilibrium/our-people.



Colin wins Entrepreneur of the Year Award!



Managing Partner, Colin Lawson, has been crowned 'Financial & Professional Services Entrepreneur of the Year 2015' at the EN North West Entrepreneur of the Year Awards, which were held at The Mere in Knutsford on 21 October 2015.

Now in their 14th year, the EN Awards recognise and celebrate the outstanding contribution which businesses make to both the North

West and UK's economy. The judges commended Colin's entrepreneurial approach to a process-driven industry and the business model that has enabled us to deliver a more personalised service to clients.

Colin said: "I'm honoured to have received this accolade from my peers in the region. It's fantastic that Equilibrium is being recognised for leading the way when it comes to transparent and no-nonsense wealth management advice."

A huge congratulations to Colin on this brilliant achievement!

We were also recently shortlisted for the 'Excellence in Customer Service Award' and 'Best Use of Social Media Award' in the North East Cheshire Business Awards. We look forward to attending the gala dinner on 19 November to see if we are the winners!

Duck Vader wins "Celebrity Lookie Likee"



We were excited to take part in the Chester Duck Race on 19 September, and especially proud of our prized duck – Duck Vader - winning the accolade of "Best Celebrity Lookie Likee"!

A big thank you to James Blinkhorn from Vermilion Art Gallery in Knutsford (www.vermiliongallery.co.uk) for designing and making Duck Vader.

At EQ we are always looking for new ways to make a positive difference in the

local community and were delighted to be involved with Chester's second-ever duck race in aid of the Countess of Chester Hospital Babygrow appeal, which raised a total of £20,000 on the day. Launched in December 2012, this major appeal has a target of £3 million to build a new Neonatal Unit. This will enable the hospital to provide patients and their families with a more spacious environment and a greater degree of privacy for families at what can often be a very distressing time.

To find out more about the Babygrow appeal visit <http://www.coch.nhs.uk/fundraising/babygrow-appeal.aspx>.

Team EQ run the Salford 10k

Well done to the EQ team - Jamie, Neal, Laura, Vicky, Ben and Barney - who ran the Salford 10k on 6 September, raising £164.50 in sponsorship.

The Equilibrium Foundation was founded in 2010 to support good causes in the local area, focusing on the needs of the young and elderly, and aims to raise a quarter of a million pounds by 2020. For each £1 donated by our clients or staff, the Equilibrium Foundation will match the donation. This will mean the great fundraising efforts of the EQ 10k team will ensure a total of £329 donated to charities in the region. To see who we have helped so far, and to find out more about how we are #makingapositivedifference visit the Equilibrium Foundation page on our website – www.eqlp.co.uk/the-foundation.

Congratulations to Anne on her first 5k!

EQ Accounts Support, Anne Parrott, took up running at the start of 2015 with her friend, Monica. After training hard during the year Anne recently completed her first race, the Macclesfield 5k, on 27 September. All money raised has gone to The East Cheshire Hospice – well done Anne!



EQ is turning 21!

Next year is an important milestone for Equilibrium - the 10 August 2016 will be our 21st Birthday. We have had some incredible successes and achievements since we were founded in 1995, and we are currently making preparations to celebrate this significant anniversary. Keep your eyes peeled for an invitation coming your way in spring 2016 inviting you to a very special event later in the year!

As part of our celebrations, we will be looking at our key accomplishments over the 21 years, and we would love you to be involved. If you have any photographs from any EQ events that you would be happy to share with us please send them to marketing@eqlp.co.uk (including an approximate date of when they were taken) and we will include them in our 21st plans!



60 seconds with... Sarah Warburton HR and Recruitment Manager



What three things could you not get through the day without?

1. Mobile Phone 2. Diet Coke 3. Kids

What TV series are you currently watching?

Sons of Anarchy.

Can you cook? If so, what's your signature dish?

Yes, somewhat. My lasagne is pretty good!

If you could describe yourself in three words what would they be?

Loud, friendly & passionate.

If you could have a celebrity friend who would it be and why?

Adele. She seems like she would be a real laugh!

If you weren't in your current job role what would you be doing?

At home with my kids going insane.

What's your guilty pleasure?

Antiques Roadshow.

If you could have any talent what would it be?

To play the piano at a very high standard, or to be able to make money appear by magic.

If you could have any superpower what would it be and why?

To be superman. Holidays would be very cheap - you could carry all your family (even including the luggage) and fly them to anywhere you fancied. Plus you are invincible so would always be able to look after the people you love.