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## Newsletter

February 2022

**RAYMOND JAMES** | Exeter

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## **Ben Smith's arrival and our office move**

Welcome to 2022. We hope that you and those close to you are keeping fit and well. The key purpose of this newsletter is to update you on recent developments for us as a business.

### **We are pleased to announce the arrival of Benjamin Smith**

It has never been a stated goal to grow our business to a certain scale. Our simple aim is to look after the needs of our clients to the best of our ability.

The success we have enjoyed is largely due to our clients feeling positive enough about the service we provide to recommend that their friends, family and associates approach us for advice and support regarding their finances.

We continue to be surprised and extremely grateful for the way in which clients show their faith in our commitment to them.

In recent years we have come to the conclusion that so long as we remain committed to our principles and practices then it is inevitable that the team will need to grow in order to maintain the client service on which we pride ourselves. Truly, a virtuous circle.

As the business grows we will be faced with the challenge of finding knowledgeable and experienced individuals who share our commitment to service delivery and client care.

We are pleased and proud to announce that Ben Smith has chosen to join us as a Wealth Manager supporting Duncan with existing client relationships and developing new client relationships in the West Country where he is based.

Ben has been on our radar for a couple of years having worked closely with Martin earlier in his career. He has the necessary experience of delivering advice in a small team to fit in seamlessly but has also spent time working with a national firm of advisers, bringing with him an understanding of how to maintain high service standards in a bustling business environment.

Welcome aboard Ben!

### **We have arrived at our new offices at Winslade Park**

Duncan and his wife Louise have managed the project over the last few months which came to fruition last week when we moved into our new office at Winslade Park.

We now appreciate just how much effort it takes to create a physical space from which we can all work together and we are very grateful to Louise for all of her hard work. Raymond James came up trumps again; supporting us with the necessary IT infrastructure and systems to create a virtual office environment for the team to work effectively and safely in uncertain times.

Established in the early 19th century by the sheriff of Devon, Edward Cotsford, Winslade Park has been the home of a school in the mid-20th century and, in the late 1970s served as the head office for the London and Manchester assurance company. Burrington Estates Limited have sensitively repurposed the site to create a great working environment for our team and others like us.

At the heart of the development is the historic grade two listed Manor where we would be delighted to receive your company if you're passing and you fancy a very pleasant lunch or simply a coffee before a catch up meeting with us.

Whilst our telephone number remains the same, the new address for correspondence is:

**Winslade House  
Winslade Park  
Manor Drive  
Clyst St Mary  
Exeter  
EX5 1FY**

As ever, please feel free to contact us if you have any thoughts or suggestions with regards to the topics covered in this newsletter, or, any other matter that you wish to share.

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