

## A positive Perspective for growth

The new year may have begun for many with continuing Brexit and COVID-19 uncertainty, but for Perspective Financial Group, 2021 has started in an extremely positive fashion. With client demand remaining strong for its specialist services, the national financial planning and wealth management firm used the first weeks of the new calendar year to strengthen its UK-wide presence with two key acquisitions – and has every intention of bolstering its standing further in the coming months. Steven Huggill speaks to chief executive Ian Wilkinson, who is based in their Newcastle upon Tyne office, to hear more about the group's growth plans and why the North East will continue to play an integral role in its future successes.

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### IF THE DICTIONARY DEFINES THE WORD

momentum as marking “progress or development that is becoming faster or stronger”, then its pictorial equivalent could very well easily be an image of Perspective Financial Group.

The firm, whose roots in the North East stretch back to 1985, is riding a real growth trajectory.

Serving more than 19,000 clients across the country from an 18-strong office network, the national financial planning and wealth management group has £3.2 billion of assets under management, with ever-increasing numbers of clients turning to its highly-skilled teams for support across areas including investment, personal wealth and corporate planning.

And it has no intention of slowing down.

Swaying gently from an ornate wall bracket outside Regency House, the Darlington Georgian townhouse-turned-office, a sign hangs testament to its continued impetus.

The building has been the home of highly regarded financial planning provider Atkinson White Partnership since 2007, which became Perspective's latest acquisition in January 2021.

The office stands just a short stroll away from



Feethams, the area of town where Darlington Football Club once plied their trade.

And Ian Wilkinson, Perspective's chief executive, says it will help the company fulfil its own goals, particularly those around expanding further into Darlington, Teesside and North Yorkshire, with plans to add to its team very firmly in the pipeline too.

He says: “We are very ambitious, very acquisitive and keen to strengthen our presence in the North East, which is reflected through our acquisition of Atkinson White Partnership.

“Our Newcastle office has an established, 35-year pedigree and deals with around a quarter of our business nationally, working with individuals but also the corporate sector with services such as pensions, business protection and group protection schemes.

“Newcastle is the biggest office in our network with 45 staff, including 17 advisors, and Atkinson White Partnership provides us with a further dimension.

Ian continues: “We were very impressed by the way its retiring founders Simon Atkinson and Neil White had developed the business, and saw it represented a really good fit because we both do things very professionally.

“Their entire team of advisers, paraplanners and administrators – including financial adviser John Illingworth and trainee paraplanner Bozena Toczek-Jasinska – has come over to Perspective and we are looking to grow and add to the headcount.”

That recruitment drive, reveals Ian, will be supported by Perspective's in-house Training Academy, which was created in 2014 to usher in new talent and embed the company's ethos into employees from the start across its entire office network.

He says: “We have some outstanding people coming into the firm at every level.

“We pride ourselves on making sure that good practice is firmly instilled in all our staff from the start, which we do through our Training Academy with thorough, on-the-job training.

“We are delighted that one member of staff from Darlington has already joined the Academy to help further their qualifications and career.”

The Darlington firm's arrival into the fold marks Perspective's 39th acquisition – coming just days after Northamptonshire's Independent Life & Pensions Group (ILPG) was added to its stable – and Ian says the business is constantly looking at potential future additions and partners.

“While we have a strong and growing national network of offices across the UK, we really value the importance of local,” says Ian, whose father Mitch created the kernel of what is today Perspective's North East operation when he launched Wilkinson Hatton, in Newcastle, in 1985.

“There is more to come, though,” he continues.

“The business Neil and Simon built up and treasured over the years is going to carry on and expand, and to help achieve that we would look to acquire other like-minded financial planning firms around Darlington and Teesside.

“We provide long-term, multi-generational financial planning and wealth management services and central to our work is our professional, client-centric, ethical approach, wherein we work a great deal alongside accountants and solicitors.

“With our move into Darlington, we would like to work with more of these firms in the town and across Teesside and North Yorkshire too.”

Ian says the progress of Perspective – which employs around 200 staff nationally – will be fuelled by ongoing support from CBPE Capital LLP.

The organisation announced a major investment in Perspective in January 2020 to accelerate its expansion by combining organic growth with targeted acquisitions, and Ian says its backing is providing a great catalyst for success.

He says: “CBPE Capital very much like what they see in terms of our strong management team, our increasingly high-profile brand, and our team's client-focused approach.

“They also share our focus on driving efficiencies across the business to generate lower costs and greater value for clients, further strengthening our competitive proposition.

“CBPE Capital are a long-term investor, which gives us the ability to do a really good job for firms like Atkinson White Partnership. We can really help develop companies like them.”

And he adds such backing, alongside Perspective's extensive track record in delivering high-quality services for clients, means it has continued to move forward despite the impact of COVID-19, revealing it stands extremely well placed to take further steps as the pandemic hopefully abates.

“We have adapted really well to the COVID-19 situation; it has pretty much been business as usual,” says Ian.

“We have found clients are increasingly comfortable using Microsoft Teams and digitally-secure portals to communicate with us, which brings some real advantages.

“Even when life returns to some sort of normality, we fully expect technology to play a major part in the future and we are well invested in the ability to do that.

He continues: “In many ways, the pandemic has shown up the fundamental strength and professionalism of what we do.

“We do things properly; our advisors are very well qualified, we have scaled over the years to provide services to a high standard, and it is this ability and level of professionalism that really counts.

“We have the right people, we handle clients well and we have the resources to fulfil their every need.

“I am proud of what we've achieved and the ambition we still have for the future.”

For more information about Perspective's services, contact its Newcastle office on 0191 217 3340 or its new Darlington office on 01325 289400.

All calls to and from Perspective's landlines and mobiles are recorded to meet regulatory requirements.



### Perspective Financial Group

Alongside its specialist support for individual and corporate clients, Perspective Financial Group is also helping youngsters succeed. Working with the Business2Schools initiative (B2S), it is donating IT equipment for use in classrooms. Ian Wilkinson, chief executive, says: “We invest in high-quality IT kit, but when we appointed TSG last year to manage our IT systems, some of this wasn't technically compatible with our new approach. So we're working with B2S to donate our surplus IT kit to them – it's all about helping children and closing the digital divide, which are prominent issues at this time.”