

From its beginning in 2001, SGWM's ethos has remained unchanged: the interests of its clients are at the heart of everything it does. The pillars of the business – accountability, impartiality and trust – are enhanced by a genuine partnership between adviser and client. We have advised many of our clients for 10 or 15 years now," said Stephen Girling. "We are so pleased to see them able to live the lives they wish to live, with sound wealth management and planning."

In 2011, SGWM acquired Ipswich-based Stan Gaskin Ltd, bringing together two of the region's leading financial planning and wealth-management firms with the added benefit of a Corporate Services Division. A skilled and experienced team is on hand to deliver expert financial planning, investment management, and employee-benefit solutions. As independent financial advisers, impartiality is a core element of SGWM's proposition and no product is favoured over another: advice is based entirely on providing the best solution for each client.

The high standards maintained by the SGWM were enhanced in 2016 by the appointment of Tina Smiddy as deputy director. Tina brings 30 years' experience in financial services and works alongside the managing director.

SGWM has also continued to grow support functions in paraplanning, investment analysis and client services support to continue to



■ SGWM sponsors Norwich Baroque (above left) and SG Wealth Management Norfolk Ladies Cricket team.



Pictures: CONTRIBUTED



SG Wealth Management (SGWM) provides impartial, expert, accountable and trusted advice to a growing client base. Managing director **STEPHEN GIRLING** (far left), and chairman **Dr ANDY WOOD** look back over a successful 2016 – and look forward, to 2017.

deliver exemplary services for clients, and attract new talent.

A highlight of 2016 was the inaugural SGWM gala concert in the stunning setting of Norwich Cathedral. Over 500 people enjoyed performances from Norwich Baroque and guest soloists, violinist Adrian Chandler and cellist Kate Bennett.

Supporting the arts and community is important to SGWM. As sponsors of Norwich Baroque

and the SGWM Norfolk Ladies Cricket, the company supports opportunities in the belief that a vibrant community is a thriving community.

Both clients and advisers at SGWM have reason to look back on a sometimes turbulent year with satisfaction.

"Many of our clients enjoyed pleasing investment growth this year, despite uncertainty caused by Brexit and Donald Trump's election

in the US," said Stephen. "Our focus on pro-active tax planning and investment management with the longer term view in mind prevents the kind of rash short-term decision-making that can come from watching news headlines too closely."

2017 will see the Ipswich SGWM team relocate to new offices at Waterfront House, a six-storey maltings building on the Quay, which has undergone a multi-

million pound restoration.

The Norwich team will be strengthened in January with the appointment of Andrew Morley, seasoned adviser and pension specialist.

Andy Wood said: "We offer real peace of mind to our clients and those who work with us, as we seek to draw on our considerable expertise to deal with the many complexities of investment decision-making on their behalf."

SG CORPORATE SERVICES
Corporate Benefits Solutions.

AUTO ENROLEMENT
WE'LL GUIDE YOU IN SAFELY

We help ambitious local companies reward, support and retain talent.

Our aim is give every employer, no matter how small, access to a professional, independent service that will implement an Auto Enrolment solution on time.

SG WEALTH MANAGEMENT
Impartial, accountable and trusted.

We are here to help you live the life you wish to live

Have you considered your financial New Year resolutions yet?

Our service is totally client-focused, we bring together intelligent financial planning and discretionary investment management.

VOTED ONE OF THE UK'S TOP 100 ADVISERS IN 2012, 2013, 2014 & 2015 BY CITYWIRE.

