

October 2023

Dear Client

I am writing with news of some exciting changes we have made to the practice this year.

We have been providing advice to our clients for over 25 years and need to plan ahead to ensure that we both develop as a practice and have continuity in the future for your long-term financial planning needs.

Bright Blue Wealth (BBW) have therefore completed a strategic agreement with another Openwork Practice, The Penny Group Ltd (tPG).

Myself, Graham and Hardik, ably supported as ever, by Ted and Debbie will continue to trade under the current name from the existing Chertsey based offices to ensure there is minimal disruption to the current operation.

The Penny Group are one of the most successful and largest of the firms within Openwork and I have personally worked alongside one of the Directors, Graeme Morrissey, for the past seven years. Based in central London they serve clients in the same areas as BBW, use the same technology and investment funds and we share a common business ethos.

The Penny Group is a Chartered firm and their appearance in the 2022 Financial Times top 10 advice firms in the UK demonstrates the quality of the organisation we have chosen to partner with. The team and I are excited to be working with them and believe it will complement our business and allow us to continue to build on the holistic service we provide to a great many families.

Whilst there will be no immediate changes to our current service, the partnering with tPG is the first step towards a well-thought through succession planning process, to ensure all your financial planning needs continue to be met in the future with a continued focus on quality of service.

Our new partnership with tPG has provided enhanced operational support and allowed us to re-negotiate our lease, which was due to finish in 2025, re-configure our website and we are currently upgrading the office technology.

In addition, we are pleased to say that we will add to the team with a new para-planner joining us in December. Beyond that, the support of a larger firm strengthens our overall proposition and service.

We are delighted with the work so far and will keep you abreast of transitional changes in the coming months. I am certain this will only strengthen the level of service we can offer our clients whilst ensuring the continuity of the current relationships.

If you have any questions on this or any other matter, please do not hesitate to contact me.

Very best

Andy Wilmot
Practice Principal