



AUGUST 2023

# SUMMER NEWSLETTER 2023



# STRATEGIC SOLUTIONS ANNOUNCES UK'S YOUNGEST CHARTERED FINANCIAL PLANNER

**Jordan Cruse** has been awarded the prestigious title of Chartered financial planner at just 21, claiming the record as the UK's youngest Chartered financial planner.

Jordan's career in financial services began in 2017 when he joined Strategic Solutions at 16 years old. Since then he has passed several financial exams and spent time within the paraplanning team in order to build his skills, experience and knowledge.

Jordan says he's extremely pleased to achieve such a prestigious qualification at such a young age but his ambitions don't end there. "Following my Chartered status I now plan to work towards my CF8 and CF6 exams in order to become a Chartered fellow" said Jordan. This is the highest qualification awarded by the CII.

"Chartered status shows a commitment to our profession and a clear indication of someone wanting to be the best financial planner they can be for their clients and the community



Jordan's achievement is amazing and signals the quality next generation of advisers coming through in our firm and our profession and is a real shot in the arm for all of us that have been around a long time.

The whole team here couldn't be prouder of what Jordan has achieved" said Kevin Forbes, Chartered financial planner and founding partner of Strategic Solutions

# SUMMER ACADEMY TEAM AWAY DAY

The **SSFS** team recently enjoyed a fantastic away day in Newton Abbot for our summer academy to celebrate ten years of the Newton Abbot office.

The day was an opportunity for the whole team from across the south to get together and receive market updates from Premier Miton, Artemis, Triple Point, Casterbridge Wealth Investments, Legal & General Investment Management and Hawksmoor.

This was followed by Ladies Day at Newton Abbot Racecourse. Strategic Solutions were proud to sponsor the Novice's Hurdle Race and were honoured to present the winner with their award in the exclusive winner's enclosure.



# COMMUNITY FOUNDATION UPDATE



**The Stover Canal Trust** in Newton Abbot is a registered charity dedicated to preserving and restoring the line of the canal for the local community.

We've recently helped them to purchase a new tractor mounted saw bench. This equipment will enable the volunteers to chop logs from trees that have either fallen or been felled from around the canal.

These logs are then sold to raise money for other vital equipment and diesel for the tractor. It's great to be able to support such a worthy local cause.

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We've also recently helped the **Lee Choral Society** in Lee-on-the-Solent celebrate their 65th anniversary. This culminated in a performance of Mozart supported by an orchestra and four professional soloists.

The Lee Choral Society is a volunteer led, registered charity formed in 1959 with around 65 members. The choir rehearses weekly to prepare for three to four concerts each year.

Their aim is to promote, improve and maintain public education and appreciation of the art and science of choral music. However its members also love the social aspect of these weekly meetings.

# COMMUNITY FOUNDATION UPDATE

This is the third year that SSFS have entered a team in the **charity golf day hosted by Simplify Consulting.**

Each year they support a good local cause and this year it was Smile4Wessex who support the Wessex Neurological Centre.

All proceeds have gone to help them provide acute and specialist care to patients from across Hampshire, Dorset, Wiltshire, Isle of Wight and West Sussex. A record **£23,794** was raised from this golf day.



We were also pleased to be able to support the **Boyd family**, a close friend of our paraplanner Paul Rogers. Tam Boyd's son Kian, 18 collapsed during a football match in January and was diagnosed shortly after with a rare form of blood cancer.

Tam Boyd, a keen cyclist then embarked on the Ride London-Essex 2023 bike event, a 100 mile course to raise money for **Blood Cancer UK.**

His target was to raise £5,000 and just a week before he was due to take part he was short of £315. Strategic Solutions were able to step in and contribute £500 enabling him to beat his target. His family were thrilled.

In May this year he successfully completed this incredible 100-mile challenge in just over five and half hours.

Kian is continuing his treatment and due to undergo a stem cell transplant. We wish Kian and his family all the best.



# COMMUNITY FOUNDATION UPDATE

We're so pleased to be continuing our support of **St Michael's CE School** in Bournemouth who have been offering a warm meal to families every Wednesday in their **Mid Week Meals** scheme.

The scheme has proved so successful since it was launched in 2022 with 18 to 20 families fed every week.

The cost of living crisis has affected so many people within the local community and they've said its been wonderful to be able to help so many on a weekly basis in safe and familiar surroundings.

In addition to providing a warm meal they also offer activities for the children while they're waiting for the food. This in turn gives the adults time to chat and meet the volunteers.

It's developed into a real community event.



The food is prepared by the West Cliff Hotel who provide a chef to cook this. The ingredients are purchased and paid for by the school and **SSFS have donated over £2,000** to this really worthy cause.

# AWARD NOMINATIONS



We're delighted to announce that we've been shortlisted in the Investment Life and Pensions Moneyfacts Awards 2023 for:

- Retirement Adviser of the Year
- Investment Adviser of the Year



We're also pleased to announce that we've been shortlisted in the Money Marketing Awards 2023 for:

- Charity Champion of the year



Congratulations are in order for Paul Roberts who has recently achieved Chartered status. Well done Paul!

Paul is one of around 5,500 Chartered financial planners in the UK with Strategic Solutions proudly boasting a huge 21 advisers at this level or above.

# STAFF NEWS

**Justine Geldard** has recently joined the team in managing the marketing, social and communications.

She is helping to compile content for the website, communicate company news and share the fantastic work of the community team.

Please get in touch with any ideas for blogs or social media content.

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**Julia Parker** has joined Abi Stidworthy and Vanessa Taylor in the Newton Abbot office supporting them with their administration needs.

This follows India Hawes recent attainment of her diploma and imminent maternity leave.



**Julia Wozna** and **Jack Simpson** have recently joined SSFS for their student placements.

We look forward to welcoming them to the team and wish them all the best in their upcoming work placement.





# OTHER NEWS

## Cost Of Living Crisis

If you or a family member are struggling with the cost of living or would like any advice then please get in touch. We're always here to help.

[info@ssfs.co.uk](mailto:info@ssfs.co.uk)

0800 160 1800



## The Mortgage Charter

The Treasury has launched the Mortgage Charter; a set of standards aimed to help those worried by rising interest rates.

The Mortgage Charter focuses on what lenders can offer their customers, this includes allowing borrowers to switch to an interest only mortgage or extending their mortgage term to reduce their repayments.

In addition, existing customers will be able to lock into a deal up to six months ahead.

*“A mortgage broker often has access to exclusive products which aren't available to a customer direct”*

Holly O'Donnell,  
Independent Mortgage & Protection Advisor





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