



SUMMER 2024

Bulletin

August 2024



 **Strategic**
SOLUTIONS
CHARTERED FINANCIAL PLANNERS

Strategic Solutions Achieves Top Gold CSR Re-Accreditation With 96% Score

The firm are celebrating a remarkable achievement after securing a Gold CSR Re-accreditation with an unprecedented score of 96%. This milestone, possibly the highest ever awarded, highlights our dedication to corporate social responsibility (CSR) and reflects our ongoing commitment to sustainability, community engagement, and workplace culture.

We initially received a Silver CSR accreditation in 2021, with a score of 76%. Since then, we have worked diligently to enhance our performance across all areas, focusing on the four pillars of CSR to achieve this distinguished Gold status.

The significant improvement in our score is a testament to the hard work and energy invested by the entire team over the past three years.

CSR-A, a UK-based organisation that delivers a global standard for social responsibility, praised us for our inspiring journey. "The accreditation process helps organisations like Strategic Solutions to focus on their sustainability commitments. It provides them with a framework and roadmap for continued growth and positive impact," said a CSR-A representative.

Environmental and social responsibility are constantly evolving, and organisations need support to stay ahead of critical issues such as fostering a purpose-driven workplace culture and engaging with their communities.

Dean Rush, Head of Risk & Operations expressed his delight in the achievement: "We are a community-focused organisation with a great culture, which drives us to continually improve in the CSR space. This is wonderful news and an achievement we're all very proud of. We will be wearing our Gold accreditation mark with pride, hoping that it encourages other firms to follow suit to the benefit of their communities. We would like to thank CSR-A for their support throughout the process and look forward to continuing our relationship with them."





First Placement Students Celebrate Success With Chartered Achievements

Strategic Solution's first placement students from the Future of Advice initiative have celebrated their fifth anniversary with Chartered and Chartered Fellow achievements

Katie Brown and Dan Lock have achieved prestigious titles, with Dan achieving Chartered Financial Planner status and Katie achieving Chartered Fellow status. Both are also celebrating five years with the firm.

Katie and Dan were Strategic's first placement students from the Future of Advice programme; an initiative established to attract young talent into the financial services profession and raise awareness of this rewarding career path.

Katie and Dan have shown exceptional dedication and hard work and we're immensely proud of their achievements, having joined us from Bournemouth University.

The Future of Advice programme is a collaborative effort involving Bournemouth University, The Personal Finance Society, FP Wealth Management, Ward Goodman, Simplify Consulting and ourselves.

The goal is to attract young talent into the financial services profession and build a sustainable, repeatable and scalable framework for an Undergraduate Financial Services Student Placement Scheme.

The placement programme is supported by access to a comprehensive suite of documentation and ongoing training throughout the placement year.

Anyone interested in finding out more about the programme and becoming involved in the undergraduate placement schemes can visit <https://ssfs.co.uk/strategic-solutions-first-placement-students/> for more information.



Some of the projects we have supported:



Christchurch Foodbank



Colour Works Foundation



Parkfield School

Community Foundation Donates Over £200,000!

Strategic Solutions has reached £200,000 in donations to local causes from its Community Foundation

Over the past five years since it was established, the Community Foundation has helped over 100 charities and organisations across the south coast.

To date, the Community Foundation has generously contributed an impressive £225,335 to worthy causes, further solidifying its status as one of our most impactful initiatives.

The Community Foundation aims to have a positive impact in local communities. The primary objective is to channel grants towards small, grassroots groups facing funding challenges but hold immense potential for creating real change with limited resources.

The Colour Works Foundation recently received a £2,000 donation and Liz Davies, CEO expressed her gratitude and explained how the donation would support their work helping young people in Bournemouth. “Through our ‘building self-belief’ programme young people are given skills to understand themselves, understand others, develop decision-making and improve their communication, but most of all they leave the course knowing their own value”.

The committee is dedicated to supporting more local charities over the coming year, aiming to support and assist as many as possible.

Please get in touch if you would like the Community Foundation to support your local project ssfs.co.uk/community

Team Enjoys Exclusive Bowls Training at Yeovil Bowls & Squash Club

Members of the Strategic team had the opportunity to participate in a bowls training session, courtesy of the Yeovil Bowls & Squash Club.

This year, the Community Foundation proudly sponsored the club's annual Men's Invitation Triples Tournament, one of the most significant events in the Yeovil bowls calendar.

The tournament draws teams from across Dorset, Somerset, and Wiltshire, bringing together some of the region's top players for a day of fierce competition in Yeovil.

In appreciation of our sponsorship, eight members of the Strategic team were invited to an exclusive evening of practice and training.



Strategic Partners With AFC Bournemouth To Deliver Money Workshop

AFC Bournemouth striker Enes Ünal was on hand to help Strategic Solutions deliver an important community initiative.

Despite only joining the club in January, Ünal was eager to teach young people money management skills for life.

The lessons aimed to help them learn about finances, bank accounts, budgeting, understanding credit, how much things cost and a whole host of other money-related topics.

Rob Silk, Chartered Financial Planner and secretary of the Community Foundation said: “We are proud to be able to support our local community and believe that money management education is a key life skill. There’s lots of important information in these workshops and I think they’re really helpful for kids to have an idea of where to access support and how to manage things. Partnering with AFC Bournemouth really shines a light on this important matter and hopefully provides students with the tools they need to make good financial decisions in the future.”

Students from Cornerstone Academy and St Aldhems School were in attendance and over 45 lessons were delivered across two sessions in the area.

You can read more about the workshops here <https://ssfs.co.uk/money-management>



Striker Enes Ünal



Students from
Cornerstone
Academy and St
Aldhems School



Over 45 lessons
delivered

AWARD NOMINATIONS AND WINS

Award nominations:



Money Marketing Awards 2024:

- Firm of the Year
- Charity Champion of the Year!



Investment Life & Pensions Moneyfacts Awards 2024:

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



Best Financial Planners In The South West

WIN

We are thrilled to announce that we have won Best Financial Planners in the South West at the 2024 New Model Adviser Conference and Awards!

These prestigious awards recognise and celebrate some of the top advice firms in the UK, and we are honored to be acknowledged in this category.

This win is a testament to our team's dedication and hard work.



AWARD NOMINATIONS AND WINS



MONEYAge
AWARDS
2024

SHORTLISTED

2024 Women in Financial Advice Awards!

Rachael Martin and Natasha O'Neill have been shortlisted in the 2024 Women in Financial Advice Awards!

Rachael Martin: shortlisted for Woman of the Year – Paraplanning

Natasha O'Neill: shortlisted for Role Model of the Year (small/medium firms)

These awards, now in their seventh year, celebrate the achievements of women in the financial advice community and the UK financial services sector.

The shortlist was whittled down from over 600 entries and winners will be announced on 6th November in a special gala ceremony.

MoneyAge Awards 2024

We're really pleased that we have been shortlisted in the MoneyAge Awards 2024 for the Financial Adviser Award: Small to Medium Firm of the Year!

The MoneyAge Awards celebrate excellence, innovation and professionalism in the personal finance sector.

Making the shortlist is a testament to the hard work and dedication of the team and we look forward to the winners being revealed on 17th October.

Wish us luck!

AWARD NOMINATIONS AND WINS

Two Advisers Achieve Top Rated Status In VouchedFor Awards 2024

We're thrilled that two of our advisers have achieved Top Rated Adviser status in the VouchedFor awards 2024.

Chris Bibb and Robert Dixon-Gough have been awarded Top Rated Adviser status in the prestigious awards.

VouchedFor, an online review platform, provides clients with the opportunity to share honest feedback about their experiences with financial advisers.

The Top Rated guide, featured in The Times, aims to identify the best professionals in the financial services industry based on client feedback.



Chris and Robert expressed their delight at achieving this status, attributing it to their dedication in providing exceptional service to their clients and expressed their gratitude to those who took the time to provide feedback.

"We're thrilled to receive this recognition from VouchedFor," said Chris. "It's a testament to the hard work and commitment we put into serving our clients and helping them achieve their financial goals."





STAFF NEWS

Jack Fawcett Achieves Chartered Status

Congratulations to Jack Fawcett, who has recently passed his exams to become Chartered!

There are now 23 advisers at Strategic Solutions who have achieved Chartered or Fellow status!

Jack said “I’m delighted to have achieved Chartered status and extend my heartfelt thanks to everyone at Strategic Solutions for their support.”



Strategic’s First Employee Celebrates Work Anniversary

Congratulations to Annie, our Accounts and Compliance Manager, on reaching an impressive 13 years with Strategic Solutions

Annie holds the honour of being the very first person to join our company and her dedication has been invaluable.

When Annie isn’t at work she loves spending time with her highly spirited golden show cocker Teddy who keeps her fit with his boundless energy!

Thank you for your unwavering commitment and hard work! Here's to many more years of success.



STAFF NEWS

Financial Planning For Later Life

Kerry Saunders will be visiting care homes within the Bournemouth and Salisbury areas to offer her expertise on financial planning for later life. She will be discussing the following:

Care Fees Planning
Cashflow Planning & Savings
Equity Release
Inheritance Tax
Investments

To find out more please visit <https://ssfs.co.uk/Kerry-Saunders>



Financial Planning For Later Life

Sessions run by Kerry Saunder:
APFS, Cert CII (MP & EI)
SOLLA accredit

Come along and discuss the following

- Care fees planning
- Cashflow planning & saving
- Equity Release
- Inheritance tax
- Investment

No need to book, just turn up



New Team Members

We are pleased to welcome Natasha Speed to the Strategic Solutions family, Natasha will be joining the paraplaning team as a paraplanner.

Also joining the firm as a Student Placement from Bournemouth University is Jamie Haines.

Welcome to the team Natasha and Jamie!





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