



WINTER 2025

# BULLETIN

Christmas 2025



# Inspiring Young Minds Across Dorset

In November, through our Community Foundation, we were proud to host the Oly Newton LightsOnXP schools tour across Dorset, a powerful five-day programme dedicated to promoting mental health awareness, resilience, and wellbeing among young people. Oly Newton is an international mental health advocate, trainer, and motivational speaker. His ability to connect through lived experience continues to inspire young people to face adversity with courage and to seek support when they need it most.

Throughout the week, Oly visited several schools across Dorset and at each stop, students were captivated by Oly's honest and inspiring story of living with OCD, anxiety, and depression, and how he has turned his own challenges into a mission to help others.



From large auditorium talks to interactive workshops with younger pupils, Oly created safe spaces for meaningful conversations around mental health, neurodiversity, confidence, and self-belief. Many students stayed behind after sessions to speak with him one-to-one, and several even shared their own personal experiences, powerful moments that truly highlighted the impact of his message.

We are incredibly proud to have supported this inspiring tour and to help bring such vital conversations into schools and communities across Dorset.

If you'd like to learn more about our Community Foundation and how Strategic Solutions can support your good cause, we'd love to hear from you.



# Celebrating Our 2025 Awards Success

As we look back on 2025, we are delighted to share what has been one of our most successful years to date. Our advisers, paraplanners, administrators and wider team have been recognised across the industry for their professionalism, expertise and dedication to delivering exceptional client service.

We began the year by proudly retaining the Citywire New Model Adviser Award for Adviser Firm of the Year – South West, following our 2024 win.

Soon after, we celebrated a fantastic double win at the Professional Adviser Awards 2025, first being named Adviser Firm of the Year – South West & Wales, and then going on to secure the overall Adviser Firm of the Year, a national award and an incredible achievement for the whole team.

At the Investment Life & Pensions Moneyfacts Awards, we were honoured with Retirement Adviser of the Year, Paraplanner of the Year for Rachael Martin, and a commendation for Investment Adviser of the Year.

Our rising stars also shone at the Money Marketing Young Financial Planner Awards, where Rachael Martin was named Young Paraplanner of the Year and Jon Hickson was awarded Young Financial Planner of the Year (South East & West). The entire Paraplanner team were also shortlisted

We were equally proud to see Natasha O'Neill reach the finals for Role Model of the Year at the Women in Financial Advice Awards.

In November, we were again listed among the Citywire New Model Adviser Top 100 firms, with Citywire praising our independence, continuous improvement and tech enhancements.

We close the year with further excitement as we have once again been shortlisted for the Professional Adviser Awards 2026 for Adviser Firm of the Year – South West & Wales, and individual shortlists for Rachael Martin (Paraplanner of the Year), and Jez Horgan and Annie Aston (Administrator of the Year).

“We couldn't be prouder to receive such a broad collection of awards in a single year. These achievements reflect the profession's recognition of the quality and integrity of our advisers, and they validate the hard work and dedication that every member of our team brings to their clients.”

**Nathan Harris, Partner & Chartered Financial Adviser**



# 12 Days of Christmas

Once again, we're delighted to embrace the spirit of giving with our 12 Days of Christmas campaign.

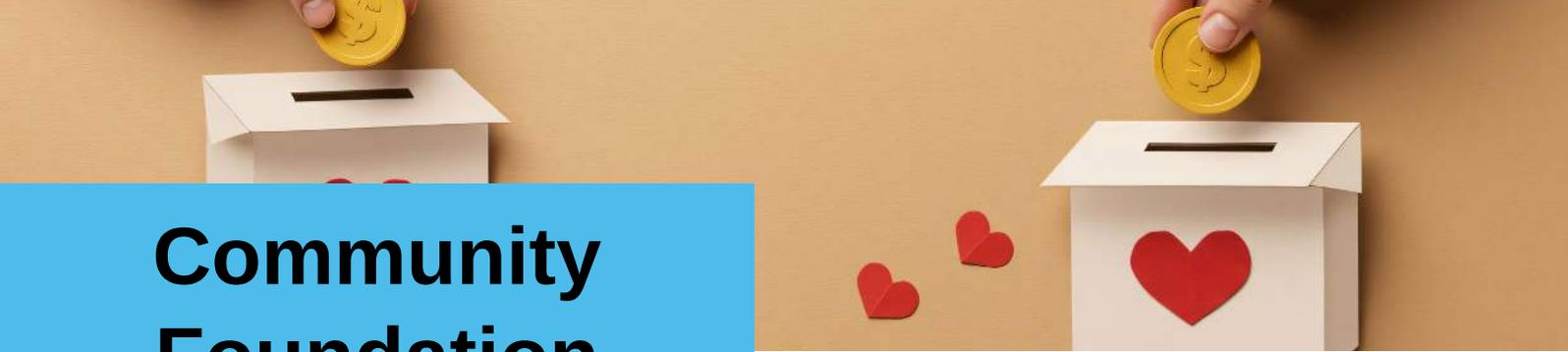
Over 12 days in the run-up to Christmas, we'll be shining a spotlight on 12 incredible causes that we're proud to support.

Each day, we'll share the story behind one of these inspiring organisations and highlight why their work makes such a meaningful difference within our communities. From grassroots initiatives to vital support services, these causes are helping people and communities thrive.

We're extremely proud of our Community Foundation, which makes it possible for us to give back to the local causes that matter most to our clients in the communities where we live.

You can follow our 12 Days of Christmas on our social channels running until Christmas Eve.





# Community Foundation Update

**By Rob Silk and  
Rachael Martin**

In 2025, the Community Foundation has continued to make a meaningful difference to a wide range of causes, and we are delighted to share that we have now reached an incredible £288,134 in donations, supporting more than 147 charities and organisations in the last six years.

The feedback from those we help is continually uplifting, and we want to thank everyone involved for the vital role they play in making such a positive impact.

While awards are not what drive us, we were honoured to be shortlisted for the Money Marketing Charity Champion of the Year Award this year, recognising the dedication of everyone connected to the Community Foundation.

Throughout the year, we have supported a diverse range of causes, including health and wellbeing initiatives, youth and educational projects, conservation and environmental efforts, local community and social-welfare groups, and small volunteer-led organisations.

One initiative we were particularly proud to host, funded by the Community Foundation, was a powerful and inspiring resilience talk at Magna Academy in Poole in May, delivered by Andrew Findley. Andrew, a veteran of some of the world's toughest endurance events, drew on his extraordinary experiences to speak to KS3 and KS4 students about resilience, mindset, and overcoming personal challenges. The session was incredibly well-received and left a lasting impression on both students and staff.

As always, we encourage everyone to follow us on social media for updates on the charities and organisations we support. Please continue to spread the word as we are always looking to help even more worthy causes. We invite anyone interested to [visit our website](#), learn more about the Community Foundation, and submit an application.

With your support, we look forward to growing further in the coming year and reaching many more milestones.

Wishing you all a wonderful Christmas and a happy, healthy new year.



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