

Taking Stock Newsletter

November 2016



Debbie Jukes

Partner

'Tis nearly the season

It's hard to believe that we are already in November, with just 38 days left to go until Christmas! 2016 seems to have flown by and we are already watching the big department stores and supermarkets battle it out for the festive ad crown (...John Lewis' 'buster the boxer' is my current favourite).

It has certainly been an incredibly busy year for EQ. We have again expanded our team and I'm delighted to have welcomed eight new colleagues to EQ this year. With it being our 21st year in business it has certainly been a milestone one for us, and all the team are really looking forward to celebrating in style at our special anniversary event for clients later this month.

As part of our 21st plans, the EQ team have taken part in numerous fundraising events to raise £21,000 for our chosen charities. Many colleagues also volunteered their time to help at local charities. You can read more

about some of the activities the team organised over the next couple of pages.

Outside of EQ, it has been an 'interesting' time in the crazy world of politics! With Donald Trump being the winner of the US election and the continuing fall-out over Brexit, it has certainly been a rollercoaster of surprising political events.

For some more light-hearted reading I hope you enjoy this issue of Taking Stock where you can find all the latest news from the EQ community. As always, I would love to hear your feedback and comments so please do drop me a line at debbie.jukes@eqllp.co.uk.

The EQ investment team run 210 miles for charity

Our investment team are cumulatively running more than 210 miles to celebrate our 21st year in business and to raise money for The Equilibrium Foundation.

The courageous team of four have organised numerous runs across the year as part of Equilibrium's 21st anniversary fundraising plans to raise £21,000 for a group of selected charities. Activities include local park runs, fell runs and marathons. From the Kielder Marathon in Northumberland to the Salford 10k, the team have been busy racing around the UK to rack up the miles covered.

If you would like to sponsor our investment team for their amazing fundraising efforts, contact a member of the Equilibrium team to donate by cash or cheque or go to <http://uk.virginmoneygiving.com/team/eqit>



The investment team preparing for one of their (many) runs to raise money for The Equilibrium Foundation

A trio of new recruits

We recently welcomed on board three new colleagues to the EQ team. Asad Qureshi joins our graduate programme after graduating from the University of Bradford, where he gained his degree in Economics. Rachel Howe joins us as Compliance Associate following a number of years working in the Retail Banking sector with Bank of America, HSBC and M&S Bank in both Fraud Investigations and Financial Crime Compliance. Clare Hamilton also joins our client manager team with over five years of experience in the financial services sector. We would like to extend them all a very warm welcome to the team!

Chester Duck Race 2016

We recently entered the Chester Duck Race for the third consecutive year. Sadly, Tim Beak did not win the race but all money raised goes to a great cause - the Babygrow Appeal at the Countess of Chester Hospital.



Equilibrium's Chester Duck Race entry - 'Tim Beak'

We launch our Fantasy Investment League

Students from The Queen's School in Chester are taking part in our investment competition for the second time. Last year's winner, Caitlin Lewis, managed to make an impressive 5.76% profit on her investment fund.

With an investment pot of £300 each to spend on stocks and shares, the girls taking part will be looking to put into practise the golden rules of investment after Paul Farrugia, Partner & Chartered Financial Planner, gave them a workshop on investing in the stock market.

The most successful trader at the end of the competition in March 2017 will win an Apple Watch and an investment certificate. Equilibrium will also donate £250 to the school and any profits made through trades completed by students will be matched by The Equilibrium Foundation and donated to a charity chosen by the school.



Brendan Durkan, Head of Economics and Business at The Queen's School with Paul Farrugia and students taking part in the competition

Supporting Save the Family

Several members of the Equilibrium team recently volunteered with Save the Family, a charity who provides residential accommodation and support for families that are homeless (or at risk of becoming homeless) and who have multiple and complex needs.

Our groups of volunteers helped build a den for children to play in, did some gardening and made food hampers.



EQ team members John Hilliard, Anne Parrott and Paul Davis helping in the garden



Sarah Warburton, Head of Culture, and Gaynor Rigby, Managing Partner, laying foundations for the new den

Rob runs the Istanbul Marathon

Last weekend, Rob Ellis, Client Manager and Implementation Team Leader, ran the Istanbul Marathon for The Equilibrium Foundation in a time of 5hrs 7mins. It was Rob's first ever marathon and we would like to say a big well done!



Runners crossing the Bosphorus Bridge from Asia to Europe in the Istanbul Marathon

Our recent community scheme winners

We recently announced two more winners of our community scheme. The scheme enables local charities and organisations to apply for grants to further support the charitable work they are doing in their local area.

The SMILE group, a perinatal mental health support group, was awarded a £500 grant. The charity, which helps families affected by perinatal mental illness, sees a small team of three part time staff and five volunteers support 120 members across Macclesfield, Congleton and the surrounding areas. The group provides its members with counselling and holistic sessions to help alleviate symptoms of perinatal mental illness such as depression and anxiety. Our grant will be used to provide their team with specialised training to ensure that they are fully qualified and kept updated with changes to legislation.



Debbie Jukes, Partner & Head of Client Care presenting the cheque to The SMILE Group

The Neuromuscular Centre is a Winsford charity set up to provide specialist services and support for people living with neuromuscular conditions such as Muscular Dystrophy (MD). The centre houses a care team which helps sufferers manage practical daily tasks. The grant will go towards the cost of purchasing a Total Body pedal machine, enabling those in powered wheelchairs to participate in exercise which helps them build muscle strength.



Andrew Hirst, Partner with Lyndsey Cannon-Potts from The Neuromuscular Centre