

Press information

1 July 2011

Equilibrium opens doors to aid platform decisions

Equilibrium Asset Management, the Cheshire-based firm of wealth managers, is opening its doors to advisers on Monday 4th July to share its knowledge and experience of the wrap platform market.

The open day is being held at Equilibrium's Wilmslow office and is part of a wider initiative by Nucleus member firms that will see similar sessions being held at seven locations around the UK* in what Nucleus is calling 'Independent Day' to showcase the benefits of being part of an adviser-owned wrap platform.

The day, which is being hosted by managing partner Colin Lawson, has been specifically designed to provide fellow advisers with an opportunity to learn more about choosing and using the right platform proposition from people who have actually been through the process.

There will be two sessions, the first from 12pm till 2pm and the second from 4pm to 6pm and advisers attending the open day can include as part of their annual Continuing Professional Development (CPD) requirement of 35 hours.

Commenting on the 'Independent Day', Mike Deverell, Investment Manager of Equilibrium said: "As a business we have a great deal of experience of dealing with most of the platform propositions currently on the market and it was that experience that lead us to become a founding member of the Nucleus wrap. It is a decision we are extremely proud of and an experience we are keen to share with fellow adviser who are still unsure as to which route they take their business. Which platform to adopt is one the most important decisions facing advisers in the run up to RDR and as a business we are keen to share our knowledge and experiences to help them get it right."

If you would like to attend the Equilibrium open day, please contact Nichola Burns on: events@nucleusfinancial.com or call on 0131 226 9800

-Ends-

For further information please contact:

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Notes to editors:

*Further open days will be held at the following IFA offices:

- FA Watts Investment Managers – Hampshire
- WR Financial Management Ltd
- Intelligent Capital Ltd – Glasgow

- Smith & Pinching Ltd – Norwich
- The Fry Group – West Sussex
- Helm Godfrey - London

About Equilibrium

Equilibrium, formerly known as Applewood, is a specialist wealth management business providing a bespoke service to its clients, primarily in the North West. Founded by Colin Lawson in 1995, Equilibrium has steadily grown to a 30 strong team which manages around £180m worth of assets on behalf of its clients from its offices in Wilmslow. The company provides advice in three main areas: investment planning, financial planning and estate planning.