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Perspective Financial Group makes further acquisition

Perspective Financial Group Ltd, the national Financial Planning and Wealth Management Group, has today announced the acquisition of North West-based IFA practice, Investment Principles Ltd. This comes less than a month after Perspective announced it had acquired Galloway Whitfield (Life & Pensions) Ltd, a North East-based firm.

This is Perspective’s 33rd acquisition since the Group was founded in 2008 and, as stated previously, further acquisitions are set to happen over the coming months. The Group’s focus is to merge established financial advisory firms within the Group to service the new clients from its existing 14 office network across the UK.

Investment Principles, founded and run by Kathy Richards has a well-established client base in the North West from the Wirral to Shropshire. The firm will become part of Perspective (West)’s operation which has offices in both Chester and Oswestry. Kathy will work alongside Perspective’s advisers as a consultant to ensure a smooth transition.

**Ian Wilkinson, Group Practice Director of Perspective Financial Group Ltd, commented:**

“This is another good acquisition for Perspective of a high quality, well-respected IFA firm which further builds our presence in North West England, an area of strength for the Group where we already have a significant client base which we are keen to build further. We welcome Kathy and her clients to the Group.

“Our focus is on delivering an outstanding personal service to clients from local offices, supported by strong and professional central services including compliance, finance, marketing and HR, meaning advisers spend their time with clients.

“We continue to look at similar high quality acquisition opportunities across the UK to further strengthen our national presence.”

**Kathy Richards, Founder and Director of Investment Principles Ltd commented:**

“I have known the senior team at Perspective for many years and have the greatest respect for their abilities and everything they have achieved over the last 10 years.

“The way the Perspective team have handled the acquisition process gives me even greater reassurance that my clients will be very well looked after. Being part of a larger group means my clients will benefit from continuity of advice and having access to a number of expert advisers within the Group.

**Julian Lowe, Director Perspective (West) commented:**

“I am delighted to welcome Kathy and her clients to our office. This is a great part of the UK to live and work in. We have an excellent team of advisers and support staff who look forward to providing a highly professional and friendly service to our new clients.”

For more information on Perspective Financial Group Ltd, visit: [www.pfgl.co.uk](http://www.pfgl.co.uk)

**ENDS**

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**Notes to editors**

 **About Perspective Financial Group Ltd**

* Perspective Financial Group Limited (PFG) is a National IFA Group which employs over 160 staff across 14 offices in the UK.
* Perspective’s Group firms provide a range of financial planning and investment services to private individuals and businesses.
* Perspective’s aim is to become the leading provider of financial planning and wealth management advice in the UK. Its focus is on the provision of quality advice and providing a fully-rounded and robust proposition for all its clients.
* Perspective has been listed in the FT’s Top 100 Financial Advisers table since 2011.
* Perspective was launched in April 2008 as a consolidation vehicle within the financial services industry. It has now grown to be one of the largest, whole of market Financial Planning & Wealth Management businesses in the UK.
* Perspective works with those IFA firms considering their growth and/or exit strategy from the financial services industry and acquiring those firms under the Perspective brand.
* The Perspective Executive Management Team comprises: Ian Wilkinson; Julie Hepworth and David Hesketh.
* Perspective’s model for individual Group firms focuses on developing advisers’ recurring income business and the underlying profitability of that business whilst providing Advisers with leading technology and a wide range of cost-effective investment options and financial planning services to ensure that the highest level of service is provided to their clients.
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