



## Perspective acquires St Lawrence in Canterbury in its eighth deal of 2021 and makes two more senior hires

Perspective Financial Group Ltd (Perspective), the national financial planning and wealth management firm, today announces it has completed the acquisition of St Lawrence Investment & Pension Solutions Ltd (St Lawrence) in Canterbury, Kent, its eight acquisition of 2021.

The fast-growing Group has also made two more senior appointments: Paul Everett joins in the newly created role of Operations Manager; Andrew Luczynski joins the Training and Competence function as Manager.

The acquisition of St Lawrence in Canterbury adds 175 households as clients and around £55 million AUM to the Group, coming just weeks after Perspective announced it had already completed seven acquisitions to date in 2021.

St Lawrence, founded by David Earl in 2002, opens up a new location for Perspective in this part of the country where it already has long established offices in Eastbourne, Maidstone and London.

**David Earl, founder and Managing Director of St Lawrence said:** "I feel that now is the right moment to introduce additional strength and depth to support the services we provide to our clients in this challenging and uncertain world.

"Whilst I have taken steps over the years to put in place systems and controls to support the business, being part of a larger organisation will provide our clients with a more robust financial advice service going forwards and ensure continuity across many aspects of the firm in the future.

"It will also assist with managing the increasing regulatory burden, which is no less post-Brexit than before, and historically has only ever increased in demands on my time.

"I considered several options and concluded that the best way forward was a merger with a larger firm that shares our values, levels of professionalism and client service ethic. I was keen to retain some practical elements that will help with 'business as usual' for our clients, including retaining our Canterbury office and avoiding disruption to our clients' plans and portfolios.

"I have been delighted by the way Perspective has engaged with us on this process. Everyone I have met is highly professional, responsive and ensures clients always come first. They see the value of retaining a local, long-established office and support this with the strength of a national group. This is a very compelling proposition which I am very confident will deliver long term security to the provision of financial advice to our clients and career security for our staff.

"I am pleased to be remaining as a Financial Adviser and will continue to lead the Canterbury office, so clients will notice relatively few changes other than our new name and branding. We will be known as Perspective (South East) Ltd. I am also delighted that the rest of the team here will also be joining Perspective."

**Paul Everett joins Perspective's management team in the newly created role of Operations Manager.**

He has over thirty years' experience in financial services, most recently with Manse Capital in Yorkshire, a large regional IFA business, where he was Managing Director for four years. Paul will support the Group's operational strategies to further enhance Perspective's proposition and improve efficiencies to the benefit of its 20,000 clients.

**Paul said:** "I am delighted to be joining the Perspective team at an exciting period in the growth and development of the Group. Having known the top team for five years or so I was very pleased to be offered the role and look forward to making a difference in 2022 and beyond. Everyone I have met so far has been very professional and welcoming, and clearly wants Perspective to succeed which I am absolutely sure we will do."

**Andrew Luczynski joins as manager in the Training & Competence function** to support further growth in the onboarding of advice teams following acquisitions, as well as developing existing staff. He also has over thirty years' experience in financial services spent with national firms including Co-operative Financial Society and Chase de Vere.

**Andrew said:** "I'm really excited to join such a progressive group with real drive, ambition and genuine client centricity. The commitment of my colleagues to building and sustaining long term growth through the ongoing development of the competence and skills of our financial advisers is impressive."

**Ian Wilkinson, Chief Executive Officer of Perspective said:** "This acquisition is further evidence of our position of being the 'acquirer of choice' for many high quality IFAs across the UK to add new locations to our growing network. St Lawrence fits our profile well with many of their client relationships averaging 25 years' duration and spanning multiple generations.

"For us, it's essential the firms we acquire share our client-centric approach as this is absolutely fundamental to our success. Our flexible deal structure means those wishing to sell can ensure the deal satisfies all their criteria – so it's a positive move at the right time for their clients and their staff, as well as for them personally, professionally and financially. I'm delighted to welcome David and his team to Perspective.

"Our two further senior hires in Paul and Andrew, both of whom have extensive sector expertise, continues our strategy of strengthening and broadening our management team to support our acquisitive and organic growth goals in 2022 and beyond, whilst ensuring our clients remain at the heart of everything we do. We warmly welcome both Paul and Andrew, together with David and the team from St Lawrence, to the Group."

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