

Thesis News



July 2011

Welcome to Thesis News, our bi-monthly bulletin that updates you on the latest developments and stories from Thesis.

Stuart Prior goes the distance!

Stuart Prior, Portfolio Assistant to our Optima Team in Guildford, took part in the Rotary Club of Leatherhead - Midsummer 10k run on Sunday 19th June. The event took place on Headley Heath in Surrey, an area of outstanding natural beauty managed by the National Trust.

There were 182 runners in total and Stuart came 125th, finishing the course in just over 57 minutes. Stuart said he was "slightly disappointed and could have pushed harder" but is pleased that he didn't need the assistance of St John's Ambulance.

Rotary act as a facilitator to enable local people to take part in a 10k run and at the same time, raise funds for a charity of the participant's choice. In its first two years the event has raised over £12,000 for charities and they anticipate that this year will have beaten that record.



£50 challenge for Chestnut Tree House Children's Hospice

For the third year running we have pledged to support Chestnut Tree House Children's Hospice. Like other businesses in the region, we have taken up the hospice's £50 challenge with each of our offices given three months to turn £50 in to the highest amount possible for the hospice through office led fundraising. We'll let you know how we get on...



The £50 challenge is just one of the activities we'll be doing to raise funds for the hospice as we strive to raise a total of £6,850, an amount to cover a day's running costs for Chestnut Tree House.

For more information on Chestnut Tree House and how you can support please visit www.chestnut-tree-house.org.uk

Moving on up

Sam Jackman, from our Lymington office, has recently been promoted to Assistant Investment Manager from his previous position as Portfolio Assistant. Sam has been studying for his Chartered Institute for Securities and Investments (CISI) Diploma in Private Client Investment Advice and Management and is eagerly waiting for his results to come through for the final part of this qualification.

CISI is the largest and most widely respected professional body for those who work in the securities and investment industry in the UK.

We wish Sam well in his new role with Thesis.

New additions

Over the past 12 months we have experienced a bumper year for staff recruitment and have nine new joiners to Thesis. We are pleased to welcome the following people to the team:

Chloe Bubb, Kumbi Chillongo, Emma Liddington, Ryan Patterson, Maria Villalonga, Sam De'athe, Joanna Fellingham, Heidi Pannell and Lisa Trimm

Corporate sponsorship



We have once again decided to join forces with the Institute of Financial Planning (IFP) and have become sponsors for 2011-2012.

By supporting the IFP we are better able to understand the current issues of our financial planner introducers and support the cause of IFP in its crusade for providing well qualified and competent advice for consumers in the UK.

We intend to become regular attendees to local IFP branch meetings and share in the debate with financial planners around the regions in the run-up to implementation of the FSA's Retail Distribution Review in January 2013.

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A walk in the park

Unfortunately June did not bless us with never-ending sunshine but the weather didn't dampen as our Brighton team hosted clients around National Trust guided tours at Wakehurst, Parham and Bordehill gardens.

Despite the spectacular thunderstorm endured at the final event, these informal tours have proved a great success with our clients and the talks provided by each venue's head gardener provided an interesting insight into the work undertaken by the National Trust.

Education, education, education

The team at Guildford have been busy over the past couple of months with professional introducers and local business groups sharing some of their knowledge and providing an insight into how we manage client money.

Through interactive sessions Kate Nathoo and her team have been able to demonstrate the workings of our systems and how practically our research and investment decisions flow through to the way in which we manage a client's portfolio. Attendees found this enlightening and a good demonstration of how a Discretionary Investment Manager can add value.

Meanwhile Edward Fane and John Devine were once again invited to speak to the Guildford Probus '83 Group and provide a latest update on Thesis' current strategy and asset allocation.

The Probus Club Movement was formed in the United Kingdom in 1965. Often sponsored by Rotary International, Probus Clubs cater for the interests of retired or semi-retired professional or business people.



For more information or feedback please contact:

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This update is for information only and is not an invitation to engage in investment activity.

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