



## NEWS RELEASE

**2 August 2016**

### **Ascot Lloyd acquires Harvard Financial Management**

Ascot Lloyd, the national Independent Financial Adviser (IFA) firm specialising in financial planning, wealth management and corporate benefit solutions, announces the acquisition of Harvard Financial Management (Harvard).

Harvard is a financial adviser based in Christchurch, Dorset, specialising in providing pensions, investment, wealth management, financial planning and life insurance services to private clients.

The acquisition is in line with Ascot Lloyd's strategy of increasing its national presence, and will enable it to enhance the services it offers in the South of England. A number of Ascot Lloyd financial advisers will join the nine Harvard staff currently based in Christchurch in a collaborative approach to develop the firm's offering across the wider region.

Richard Dunbabin, chief executive officer, Ascot Lloyd, says: "We are pleased to be expanding on the South Coast with an acquisition which adds significant potential for us to grow the services we provide in the area. This is a strategically significant acquisition, which complements our proposition with considerable expertise in specialist areas of advice such as pension transfers.

"Harvard boasts an excellent client base and talented team of advisers and support staff. We remain acquisitive and will continue to look for similar businesses that can contribute to our mission of building the UK's leading national IFA firm."

Mark Werner, managing director, Harvard Financial Management, adds: "Ascot Lloyd shares our commitment to excellent client service and market-leading financial advice. This move will enable us to achieve economies of scale by utilising Ascot Lloyd's impressive back office and central functions, freeing up more time for our financial advisers to focus on the quality of the solutions we offer. I look forward to working with our new, larger team to develop our business through a new period of growth."

Harvard will trade as Harvard Financial Management, part of the Ascot Lloyd Group.

**- Ends -**

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### **Notes to Editors**

Ascot Lloyd is a national Independent Financial Adviser (IFA) firm specialising in financial planning, wealth management and corporate benefit solutions. The Group employs 168 staff managing more than £2billion from locations including London, Christchurch, Manchester, Wokingham, Cardiff, Rickmansworth, Harrogate and Wolverhampton.