

Sarah Quirk

WEALTH ASSOCIATES

NEW YEAR NEWSLETTER 2024

Wishing you a Happy New Year
from *Sarah and the Team*



The benefits of a financially healthy nation



Financial wellbeing is not only essential for us as individuals, but it also has an impact on communities and the nation as a whole. When you have control over your finances - which includes being able to pay for bills, handling unexpected expenses, and planning for a secure financial future - you can lead a healthier and more stable life. Moreover, when individuals feel in control of their money, it benefits the wider society, as businesses prosper, and the economy thrives.

Given that many adults lack confidence in managing their finances, it is essential to educate individuals on financial matters. At a regional level, there may be significant disparities in our attitudes towards money and perceptions of wealth, which is why it is crucial to ensure that everyone has access to financial education.

Empowering people with financial knowledge and skills benefits the entire nation. We should all take care of our friends and family and look out for signs that someone may be struggling with money and mental health. Encouraging them to seek support is essential and can make a significant difference to their wellbeing.

If you would like to discuss this more, please do get in touch.

Practice News

PARACHUTE JUMP FOR DEMENTIA UK!

Alec and Natalie bravely participated in a skydive in August to raise funds for Dementia UK. Here's what they had to share about their experience:

They received an email the night before the jump, which was a rescheduled date due to a previous storm. They both had a relatively sleepless night before the big day. The alarm went off early Friday morning, and they drove to Old Sarum in foggy weather. They eventually saw blue skies after waiting for three hours and getting themselves hyped up.

The plane was started, and the first jumpers took off. Natalie and Alec were in the third flight of the day, and Natalie was excited to learn that she would be the

first one to jump out of the plane after some friendly banter with their instructors. The plane climbed up to 10,000ft in clear skies and gave them great views of the surrounding area, including Salisbury Cathedral. The light in the plane turned green, and Natalie screamed as she jumped out of the plane, which didn't fill Alec with much confidence. Alec's turn came, and he jumped out as well.

Both Alec and Natalie were in freefall for thirty seconds, dropping from 10,000ft to 5,000ft at approximately 125mph. When the parachute was pulled, they both agreed that it was the quickest 30 seconds they had ever experienced. They had a gentle fall to earth, which gave them the opportunity to enjoy the views of Salisbury Plain and the city. Natalie had to walk on some clouds, and Alec had to control the parachute.

Finally, they both safely landed on the ground, which topped off what was an unforgettable experience for them.

We want to thank all our clients that made donations and sent their best wishes to Alec and Natalie.

Would they do it again? You bet, but from 15,000ft next time.



POTTERY DAY

In October, Mark and Trudy from Flamed Earth Ceramics visited us for a pottery team building day, and we couldn't be happier about it. We had an amazing time making highland cows or gonks and are eagerly anticipating the finished results.

We had so much fun that we are planning to do it again soon, maybe as a client event next time





Team member news

Jo joined our team at the beginning of 2023. Prior to joining us, she worked as an Executive Assistant for another Partner Practice in St. James's Place. After completing her University degree, Jo worked in Investment Finance. Later on, she worked as a personal trainer in the Middle East. Jo is a mother of two teenage boys who keep her very busy outside of work, but she still maintains an active lifestyle. In October 2022, Jo successfully completed the London Marathon! Apart from this, she enjoys travelling.

We have moved

Towards the end of the year, we left our previous office in Wickham and have now set up home in a new office in Segensworth. We are now settled in and enjoying working in a light, open plan office – the dogs are certainly enjoying the extra space!



Our new address is
5 Gloster Court,
Whittle Avenue,
Segensworth,
Hampshire, PO15 5SH.

If you are in the area,
please do stop by
and say hello.

DOC PORTAL

Here at SarahQuirk Wealth Associates, we are continuously looking to improve the service you receive and part of this includes the delivery and storage of your documents.

With mounting security breaches and increasing compliance requirements, post is no longer the safest way to send important documents. To properly maintain your confidentiality, we are introducing a new, online Document Portal to ensure important information reaches you as quickly and securely as possible.

Uniquely, the Portal has a private area that only you can access. You can store personal documents such as banking, investment, tax, photos, wills and even the kids' artwork and school reports. It's a fantastic way to keep your most precious documents and memorabilia safe for future generations.

It is highly secure, very easy to use and can all be accessed via a Mobile App, reassuring you that your documents are safe and accessible at all times.

We will be sharing more information about this exciting development soon, so please keep an eye out for updates!

QWIL

We are excited to share that, thanks to its successful rollout last year, more and more of our clients are using Qwil to communicate with us. Qwil is a secure and user-friendly instant messaging service that acts as a convenient way for you to get in touch with us.

If you haven't already joined Qwil and would like to use this service, please don't hesitate to get in touch with us. We would be more than happy to help you get started with Qwil.

SOCIAL MEDIA



sarahquirk_wealth_associates



SarahQuirk Wealth Associates

We want to remind you that we are active on social media! Please take a moment to check out our social media pages and consider giving us a follow. This way, you'll be able to stay up to date with our latest practice news, as well as gain access to useful information that we share regularly.



Green initiatives

Online Services: We would like to encourage you to register for St. James's Place online services if you haven't already done so. By registering for this service, you can quickly and securely review the value of your investments, add to an ISA, and make payments instantly.

We believe that this service will provide you with greater flexibility and control over your investments, so please do consider registering for St. James's Place online services.

YOUR FEEDBACK

We always value your feedback and hope that you are satisfied with our service. We believe that it's crucial to receive feedback or ideas on how we can improve our services to help us learn and grow. If you know of any friends, family members, or colleagues who may benefit from our advice, please do not hesitate to let us know.

If you are willing to provide a summary of your experience with us, you can do so in the following ways:

Email: you can send a testimonial for Sarah or Julie by email to hannah.swales@sjpp.co.uk

Google My Business: you can leave a review for us if you have a Google account, by following the attached link: <https://www.google.com/search?client=safari&rls=en&q=sarah+quirk+wealth+associates+google+business&ie=UTF-8&oe=UTF-8#lrd=0x4874699902f9e313:0xb4a5f58c297d9f15,3>

vouchedFor: Sarah has a vouchedfor profile, which is a website that helps people search for a financial adviser and check their reviews and credentials. If you would like to provide a review, please do let us know and we can send you an invitation.

Our privacy policy is available on our website which informs you how to opt out if you do not wish to receive any further marketing communications from us.

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WEALTH ASSOCIATES

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SJP Approved 23/1/2024