

Kingsford Newsletter



Here's what has happened so far in 2026 and what's to come!

Welcome to our newsletter!

As the summer has now ended, we're delighted to share the latest updates and developments from the Kingsford team.

Firstly, thank you for your continued support. Your trust and loyalty mean a great deal to us, and we're grateful to be part of your journey.

2026 has been an incredibly busy year so far. At Kingsford, we have been listening carefully to your feedback, which remains invaluable in helping us improve the service we provide. As a result, we have made some really positive changes across the business.

As you may have noticed, we have refreshed our branding, introducing a new look across our website and LinkedIn.

We're also excited to share the news of our new office. Following the recent merger of Dragon Wealth and Kingsford Wealth Management, we have moved into a shared office in Knutsford and we look forward to welcoming you there soon.

As always, we are here to provide guidance, support and clarity whenever you need us. If you have any questions or would simply like to have a conversation about your plans, please do get in touch, our team is always happy to help.

Looking ahead, we remain committed to delivering the best possible experience for our clients. The changes we have made this year mark an exciting new chapter for Kingsford, and we look forward to sharing it with you.

Thank you once again for your continued trust and support. We truly value the relationships we have built with our clients and look forward to speaking with you soon.

We hope you have all had a wonderful summer!

Warm regards,

The Kingsford Team

In this newsletter you can expect:

2026 so far

Partnership
Connect 2026

Team building

Private Dining Event

Meet David &
Louise

Kingsford
fundraising

Hear from SJP'S
Chief Investment
Officer

Thank you!



Partnership Connect Event

In January, John, Flo, Diane & Leanne attended the second Partnership Connect event in Manchester.

The day featured keynote St James's Place speakers and a panel discussion with Claire Trott, Head of Advice, James Heal, Director of Public Policy, Joe Wiggins, Investment Research Director, and three Principal Partners, discussing opportunities for the Partnership in 2026.

A highlight was hearing from James Rainbow, Chief Executive Officer of St. James's Place as he reflected on 2025 and the focus for 2026.



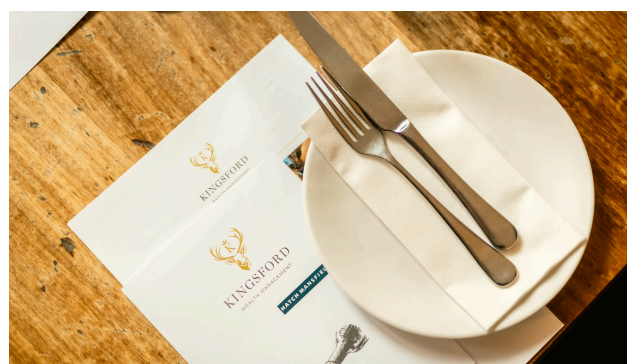
Team building

The Kingsford team walked to The Church Inn in Mobberley!

For our latest team building day, the Kingsford team walked just over 3 miles to The Church Inn in Mobberley for a lovely team lunch.

It was great to make the most of the nice weather, get some fresh air and spend some time together outside of the usual office setting. The walk gave everyone a chance to catch up along the way before enjoying a lovely lunch together.

It was also a great opportunity to spend some time with our new members who have recently joined the team and give them the chance to get to know everyone better outside of the office.



Private Dining Event

We recently had the pleasure of hosting an exclusive private dining event at El Gato Negro in Manchester, bringing together clients and friends for an evening of excellent food, wine and conversation.

This event was our way of thanking our clients for their continued support, and it was wonderful to see so many familiar faces alongside some new ones.

A highlight of the evening was the exceptional wine selection from Hatch Mansfield, with Sales Manager Sandy providing insights into the wines and pairings. We were also delighted to welcome Preksha Shah from St. James's Place, who shared valuable market insights and encouraged discussion.

Thank you to everyone who attended. We appreciate your continued support and look forward to seeing you again soon.



MEET DAVID & LOUISE



We're delighted to share with you the merger of Dragon Wealth with Kingsford Wealth Management, bringing together two established Cheshire firms and officially welcoming David and Louise to the Kingsford team.

David joins as a Director of Kingsford Wealth Management, bringing more than 17 years' experience helping individuals, families, business owners and legal professionals with strategic financial planning. He holds a BA (Hons) in Business, a master's in business management and the Diploma in Financial Planning (DipPFS). He has also been recognised as a VouchedFor Top Rated Adviser for five consecutive years, earning features in The Times and The Daily Telegraph.

After beginning his career in investment banking with Santander, Bank of America Merrill Lynch and Barclays, David moved into wealth management, becoming a Partner at Morrinson Wealth before founding Dragon Wealth. He has particular expertise working with business owners, legal professionals and law firm partners, and hosts The 6 Minute Partner Podcast.

Alongside him, Louise joins as Executive Assistant to David, bringing exceptional organisation and professionalism to support both our team and our clients. She is the first point of contact for appointments, queries and correspondence with David.

Together, David and Louise bring a wealth of experience and a client-focused approach, and we're delighted to welcome them to the Kingsford team!



KINGSFORD FUNDRAISING

This October, our Director John Greening is taking on the incredible challenge of trekking to Everest Base Camp, reaching altitudes of over 17,500 ft. This is a demanding 12-day trek through the Himalayas, involving high altitude, tough terrain, and challenging conditions. Every step of this challenge is about more than reaching Base Camp. It's about raising vital funds to help create brighter futures for children and young people in Nepal.

Supporting Nepal's Children (SNC) are dedicated to bringing quality education to the remote Nepali villages so that their children can flourish, learn new skills, and create opportunities for themselves whilst staying within their own community.

SNC has already built two vocational schools, with over 1,400 graduates now in stable employment. The funds we raise this year will help double that capacity, giving thousands more young people a real pathway out of poverty.

Where your donations go:

- Practical trades training, wiring, plumbing, carpentry, welding and tailoring
- Paid apprenticeships for women, nearly double the minimum wage
- A reason for young people to build their future in Nepal
- The next regional centre, a lasting asset for generations to c

How You Can Help

We're doing the climbing, the cycling, the swimming, the jumping and the trekking. All we ask is that you help us hit the target. Plus, every pound raised by fundraisers connected to St. James's Place will be matched by the business and used to support Jamie's Farm, a UK charity offering residential farm visits to vulnerable young people. So your donation does double duty.

Inspired by John's challenge and the work of SNC, the Kingsford team took on a series of fundraising challenges throughout 2026 to match the height of Everest Base Camp, and we're delighted to say we've now completed them all!



We conquered Scafell Pike, successfully completed Snowdon twice in two days, completed a Kingsford Skydive, and finished with the ultimate challenge of climbing Ben Nevis twice in two days, together the hikes all add up to the height of Everest Base Camp. Every step, climb, and jump was taken with one goal in mind, to support SNC and help create real, lasting change.



Every donation has brought us closer to Kingsford's £5,000 target and contributed towards John's incredible fundraising mission.



If you'd like to make a donation and support John & The Kingsford team, please [Click here](#) or scan the QR code to head straight to our fundraising page. All donations are welcome!

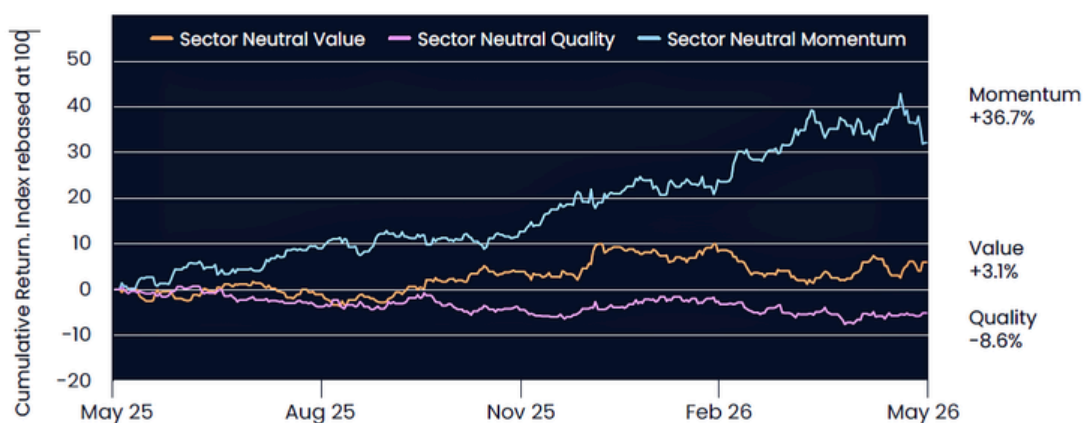


HEAR FROM SJP'S CHIEF INVESTMENT OFFICER

Using this summer's World Cup as his starting point, Justin explores how quickly momentum can shift, both on the pitch and in markets, and why resilience matters more than a fast start.

He opens by reflecting on the tournament itself: "One of the things I love about tournaments is how quickly the story can change. A team can look unbeatable in the group stage, only to run out of ideas when the pressure rises. Another can start quietly, grow into the competition and suddenly look like the side nobody wants to face." He draws the parallel directly, writing that "markets are no different. Leadership shifts and yesterday's winners do not stay on top indefinitely."

On the current environment, Justin notes that "the gap between momentum, value and quality has widened materially over the past year," to the point that "momentum is now around 45 percent ahead of quality over the past 12 months, creating a much wider spread between winners and losers."



Source: Bloomberg. Data from 17th May 2025 to 17th May 2026.

Justin also points to regional shifts, observing that "for a period earlier this year, the US took a back seat, lagging the rest of the world as market leadership broadened. Emerging markets, in particular, have delivered strong returns, outperforming global equities by a meaningful margin."

On AI specifically, Justin writes that "AI is probably the clearest example of this tournament dynamic. A small number of exceptional players are carrying a large part of the market, while the rest of the squad is still being judged on whether it can prove its role in the system." He adds that companies "exposed to the infrastructure build out, including semiconductors, data centres and parts of the energy complex, have seen strong earnings momentum and sustained investor demand," while cautioning that "the risk is that markets appear diversified at the index level, while returns are increasingly driven by a narrow group of companies."

Justin's conclusion is that "the sensible medium-term approach is not to ignore momentum, but nor to chase it blindly," and that "we cannot predict how market leadership will evolve from here. But we can control how we prepare for it." As he puts it, "the timing of any shift in market leadership is uncertain. Being prepared for it is not." Past performance is no guarantee of continued success.



Thank you for reading!

Thank you for continuing to support us. It is truly a pleasure to be a part of your journey. As always, we are here to provide you with support. If you have any concerns at all, please don't hesitate to reach out.

Be sure to follow us on LinkedIn to stay updated with the latest news and updates from Kingsford Wealth Management!



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**St
James's
Place**

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