



Heartwood boosts intermediary team with new Client Director

Paul Rose joins as Intermediary Client Director

Heartwood Investment Management today announces the appointment of Paul Rose as Intermediary Client Director.

Paul will help develop and manage Heartwood's financial adviser business solution and distribution strategy.

Paul joins Heartwood from Novia Financial Plc where, as Regional Sales Manager, he was initially responsible for developing the company's presence in the North East before taking over responsibility for the North West region. Prior to that, he was National Sales Manager at Cofunds, instrumental in the fund administration service provider seeing its highest overall new net sales in four years. Paul has also worked at Zurich Financial Services progressing to Regional Sales Manager.

This latest appointment emphasises Heartwood Investment Management's strategy to provide a business solution to advice firms. The company seeks to help firms who wish to focus on the advice aspect of their client relationships and outsource the investment management of their clients' funds.

Mark Rockliffe, Head of Intermediary Sales at Heartwood Investment Management, said: "We are delighted to welcome Paul to Heartwood. He brings a wealth of experience and an impressive reputation in the intermediary sector. He will play a key role in the development of our business amongst advice and wealth management firms in the future."

Paul Rose, Intermediary Client Director at Heartwood Investment Management, said: "I chose to join Heartwood Investment Management because of the strength of its investment proposition. Clients get access to the same sophisticated investment process regardless of the amount they wish to invest. This is complemented by a robust support framework and is a hugely compelling business solution for financial advisers."

For further information on Heartwood Investment Management, please visit www.heartwoodgroup.co.uk

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Notes to Editors – Important information

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