

Heartwood grows intermediary team with new Client Director

Chris Whittingham joins as Intermediary Client Director

Heartwood Investment Management today announces the appointment of Chris Whittingham as Intermediary Client Director.

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

Chris joins Heartwood from AV Trinity Ltd where, as Business Development Manager, he was responsible for implementing business development plans with new initiatives and developing new client relationships. Prior to this, he was Regional Sales Manager at Novia Financial where he was tasked with developing the company's presence in the South East. Chris has also worked at Zurich Intermediary Group as Senior Sales Manager. He began his career as a Broker Consultant with Equity & Law Life Assurance Society plc.

The latest appointment highlights Heartwood Investment Management's focus on providing a business solution to financial planning firms. Heartwood seeks to help firms that wish to focus on the advice aspect of their client relationships while outsourcing the investment management of their clients' portfolios. With a global, multi-asset investment approach, Heartwood offers a choice of investment strategies designed to suit a range of risk appetites.

Mark Rockliffe, Head of Professional Intermediary Sales at Heartwood Investment Management, said: "We are delighted to welcome Chris 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 with financial planning firms. We believe our dedicated intermediary team, underpinned by our investment proposition will help us to continue to build mutually beneficial partnerships with select financial planning firms."

Chris Whittingham, Intermediary Client Director at Heartwood Investment Management, said: "I am thrilled to be joining such a widely experienced team at Heartwood Investment Management. In a crowded sector, I believe Heartwood's approach to working with financial planning firms, anchored around a highly competitive, investor centric investment proposition will play a key part in helping financial planning firms flourish and deliver improved investment outcomes for their clients. Heartwood's strong investment track record and fast growing client base makes this an exciting time to join the firm and I look forward to being part of Heartwood's future."

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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Heartwood Investment Management provides investment management services for individuals, financial advisers and charities. Heartwood currently has over £3.1 billion of assets under management and administration as at 31 March 2017. Nothing in this press release constitutes advice to undertake a transaction and professional advice should be taken before investing.

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