



News Release

Cooper Parry Launches New Service Offering Wealth Strategies



Cooper Parry has launched a new bespoke wealth management service aimed at connecting it closer to the personal financial decisions of the region's business owners, entrepreneurs and high net worth individuals.

It has expanded and restructured its private client offering by combining and bringing together the financial planning and personal tax services it currently offers.

The new offering will now be called Cooper Parry Wealth Strategies and will work with clients to develop a long term strategy for their wealth which combines financial planning, personal tax advice and structuring and robust investment advice.

The new service will see the creation of jobs across the East Midlands with dedicated teams in its Leicester, Nottingham and Derby offices.

Stephen Jones, Chief Executive of Cooper Parry Wealth Strategies Ltd, said the new combined service would be an advice-led proposition and would allow Cooper Parry to treble the value of the portfolio it currently handles from £50 million to over £150 million across the three offices. It hopes to grow the Leicester team to six staff over the next 12 months.

Stephen said: "We are investing in an area we feel has enormous potential but remains vastly under-represented by other firms in the region.

"We have listened to the market and our clients and we feel there is a gap in the market which has provided us with an opportunity to create and promote this new wealth management model.

"By combining what we already do, adding more services, creating dedicated teams in each of our offices and transforming our current business model we can focus more on our client needs. We want to get closer to the region's high net worth individuals and this enhanced offering will help us deliver more value to our clients. In addition by expanding our proposition and services we are establishing a foundation for future growth across all our offices.

"Our aim is to create a compelling proposition for high net worth individuals and to deliver a first-class client experience based on objective and independent advice around their long-term goals.

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“We feel this is an excellent opportunity for all our three East Midlands offices to capture a much more significant market share. We strongly believe in the growth of this new service which is why we have invested in creating dedicated teams in each office.”

Cooper Parry Wealth Strategies will offer a range of combined services under one umbrella including personal tax advice and structuring, strategic financial planning and robust investment advice. It will primarily look to target successful business owners, families with existing wealth, and trusts with liquid assets of £500,000 and more.

The news comes as Cooper Parry restructures its business to allow it to focus more strongly on its core services as part of a three year growth plan. This targeted strategy saw the firm recently sell its pension administration and employee benefits businesses to the Leicester-based specialist pensions consultancy, Mattioli Woods.

Kevin Harris, partner at Cooper Parry Leicester, said the new offering would provide vital growth opportunities in Leicester and would create six jobs.”

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Editor's Notes

Cooper Parry LLP is a firm of advisers to private business in Nottingham, Derby and Leicester and has recently opened an office in London. The firm was placed 35th nationally in the Accountancy Age Top 50 firms in 2009 and is one of the largest independent accountancy firms in the Midlands. It has a focused client team of over 200 including 21 Partners. Derbyshire Business of the Year in 2005, the firm works in all sectors, offers a range of services and was the only UK accountancy firm to be listed in the 2004, 2005, 2007 and 2008 *Sunday Times* Best Companies To Work For listing. Cooper Parry achieved Investors in People Champion status in 2007 and were also awarded with 2 Star Status in the 2007 and 2008 Best Companies Accreditation.

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