



PRESS RELEASE

For immediate release

19 October 2017

1825 acquires Bristol-based Fraser Heath Financial Management to create South West Regional Office

1825, Standard Life's wholly owned financial planning business, today announces it has entered into an agreement to acquire Bristol-based Fraser Heath Financial Management, with assets under advice of £352m.

This will establish 1825's South West Regional Office with 23 employees including seven planners and five paraplanners. Formed 15 years ago, Fraser Heath offers a tailored service in wealth management, retirement planning and workplace pensions.

On completion of this acquisition, 1825 will have over 70 financial planners advising around 8,500 clients on around £3.7bn of their assets.

Having worked together for over 20 years, Fraser Heath's leadership team of Jim Collier, Alan Loomes and Mark Fletcher will continue the day to day running of the business post completion. In addition Jim becomes Managing Director for the South West Regional Office and will join the 1825 Executive Committee.

Jim Collier, Managing Director at Fraser Heath, said: "In coming to this decision, we've undertaken a full due diligence process on 1825 and through this we've found that we share a number of core beliefs, including a focus on long-lasting client relationships, a similar culture and comparable investment solutions.

"We're also looking forward to benefiting from being part of a larger group, from sharing and accessing resource, to further development of our people and fantastic career opportunities."

Julie Scott, 1825 CEO, said: "Fraser Heath is a great addition to our business and we welcome them to 1825. Establishing a regional office in the South West extends our financial planning footprint even further across the UK.

'1825' is the brand for Standard Life Aberdeen group's UK financial planning and advice business.

1825 Financial Planning Limited is registered in England (09756952) at 14th Floor, 30 St Mary Axe, London EC3A 8BF.

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“It’s just over two years since we launched 1825 in response to the growing demand for financial advice and there are many more exciting opportunities out there as we continue to create a financial planning business of significant scale. We remain focused on growing 1825 and helping our clients plan to live the life they choose.”

The transaction is expected to complete in Q1 2018 subject to certain conditions being satisfied, including receipt of regulatory approvals.

Media enquiries

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Notes to editors

- 1825 is a financial planning business with offices in Ayr, Bishop Auckland, Crewe, Edinburgh, Glasgow, Hamilton, Leeds, London, Reading and Sheffield.
- 1825 offers a full financial planning and personal tax advice service which is focused on client goals. Combined with a wide range of investment options, powered by globally renowned experts, and access to technology solutions, clients are able to access support how and when they need it.
- By understanding its customers, investing in technology and offering innovative solutions to meet everyone’s needs, 1825 is making it easier for people to plan their finances and feel more confident about the future.
- 1825 is wholly owned by Standard Life Aberdeen plc and is part of its leading pension and savings business, Standard Life.
- Standard Life has been successfully helping people manage their money and invest for their future since it was established in 1825. Standard Life is primarily based in the UK, with operations in Ireland and Germany. Around 4.5 million customers trust Standard Life with their savings and its teams of experts aim for excellence in everything they do.
- As part of Standard Life Aberdeen plc, Standard Life is able to draw on the financial strength and investment expertise of a FTSE® 100 and Fortune Global 500 company that is one of the world’s largest investment companies.
- To help clients find out more about financial planning, 1825 provides information at www.1825.com
- You can follow 1825 in the UK on Twitter @1825

All figures in notes to editors are at 30 June 2017 unless stated otherwise

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