
Press information

16 January 2017



Equilibrium assets on Nucleus wrap platform top £500m

Equilibrium, the Wilmslow-based wealth management firm, has topped £500m worth of assets on Nucleus's platform.

The business, which was founded in 1995 by Colin Lawson, is the biggest advisory firm on Nucleus. It first started working with the adviser-built wrap in 2007.

Equilibrium provides expertise on wealth and investment management, as well as pensions and estate planning strategies. Its discretionary investment model helped Nucleus to build the capabilities that have led to it running the biggest on-platform DFM in the UK.

Colin puts their growth over the last five years – which has seen them win £400m of new assets – down to a strategic decision to delegate the day-to-day running of the business to Gaynor Rigby as a non-advising managing partner.

Gaynor joined in 2010 and began a restructure of the business to create a very different model than most other financial planning firms. She created a team of 40 support staff to deliver a highly personalised service to clients. Equilibrium's ratio of support team (client managers) to financial planners is high at 5:1, which ensures that financial planners are able to focus on their clients' financial planning strategy.

"We've worked hard over the years to create a culture of people who do more than 'just their job'" says Gaynor. "That feeling of being part of something bigger, and 'not just what we do, but who we are matters', has been the foundation of our success. £500m on Nucleus is a huge achievement for everyone here and something that we are all very proud of."

Colin Lawson, founder and partner at Equilibrium said: "We pride ourselves on the exceptional service we offer to all our clients and are delighted that they have entrusted us to support them with their wealth management needs over the last 21 years. Our work with Nucleus has been instrumental in helping us reach £500m on the platform and we look forward to working closely with the team to hit the next milestone."

Commenting on Equilibrium's achievement, David Ferguson, founder and chief executive at Nucleus, added: "Professional advisory firms, such as Equilibrium, have been key to the success of Nucleus since we launched 10 years ago. We are proud of the long-standing partnership we have developed with Colin and his team. Equilibrium has established a well-deserved position serving clients in Cheshire and beyond and we look forward to many more years of working together."

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[About Nucleus](#)

Nucleus is a wrap platform founded in 2006 by advisers committed to altering the balance of power in the industry by putting the client centre stage.

Since then, Nucleus has established itself as a major force for change. It is now one of the UK's fastest-growing platforms and the meeting point for more than 900 adviser firms in total seeking to create better customer outcomes.

As at 1st January 2017, assets under administration on the platform were £11.4bn.

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