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40 Years of Whitechurch

At Whitechurch, we are grateful and proud to be celebrating our 40 years in business and to work within such an amazing industry. The Whitechurch Strategic Management Group (SMG) is celebrating this milestone by reflecting on those 40 years and taking you back to where it all began.

Going back to the early 80's: There's no internet, beyond some rudimentary cold-war system run out of the US defence department. You can only get yesterday's news from the daily paper, and orders are coming in and going out via the phone and fax machine. Our 'chief protagonist' Kean Seager is alternately sweating buckets in a hot and poorly air-conditioned office and sipping Bahama Mama cocktails on the beach (we presume). But he's a man with ambition, and a man with a plan.

But first he needs a name. Over the years lots of people have asked why our company is called Whitechurch. Some people think it's just a misspelling of Whitchurch down the road in Bristol. Others may wonder if it is some sort of ancestral name or historical figure. In reality, the name is unique and reflects the ability to provide reliability and security. Kean is a fan of the Wild West and associates it with the hat of many a cowboy (or today we could think of it as the 'white hat' hackers). And Church speaks for itself.

And so Whitechurch was born. Far from the beautiful head office we now have in the Old Chapel, Whitechurch started life in the back bedroom of a Southwest London house. From those early days, through half a dozen office moves and hundreds of millions of pounds later, we're here at our 40th year.

It has been a tremendous journey, from an

80's back bedroom to a thriving, highly regarded and award-winning wealth management firm. Assets under management stand close to £400 million but more importantly our staff are helping some 4,000 clients to have peace of mind and financial security.

There have been many challenges along the way, but each time, Whitechurch has come through stronger. We think that has been down to a couple of things. Our remarkable staff, both past and present, who have helped us reach this milestone. But most importantly, you, those we service and are lucky enough to work with every day, have helped to shape our amazing journey these last four decades.

We now turn to more recent business developments and achievements. The Strategic Management Group (SMG) consisting of the next generation of Seager's; Ben, Lauren, Jacob & Poppy, formally joined the Board in 2019. They help to design and deliver the strategy direction of the company, looking up from the day-to-day operations towards the horizon.

On behalf of the Strategic Management Group and the Board – we'd like to take this opportunity to thank you, our clients, our advisers, and our staff for the hard work and support you give to Whitechurch. We really do appreciate each and every one of you.

Whitechurch has always punched above its weight. Reputation is how you are perceived by others, and we are proud of the exemplary reputation Whitechurch has in the industry and is reflected in the awards we win. Most recently being awarded Best Discretionary Wealth Manager 2021 with Excellence in Ethical Investments, 5-Star Winner within the DFM Category for the Financial Adviser Service Awards



and a shortlisting as ESG Investor of the Year. But character is how you are when the outside world isn't looking, and it has been even more impressive to see the grit and determination our staff have all displayed over what have been a challenging couple of years.

Looking forwards, we are continuing to develop our future world initiatives in line with our vision to help future generations both manage their wealth whilst having a positive impact within our environment and society. We have recently progressed this by creating our own JISA with a sustainable option and building upon our successful Sustainable Investment offering by introducing a low-cost Responsible Dynamic portfolio range. We also look to continue to invest in both our ARO programme and IT infrastructure to give clients a quick way to get what they need, when they need it, supporting them to make informed decisions.

As a family-owned business, we are in a great position to take long-term decisions without needing to worry about quarter-to-quarter earnings that listed firms have to focus on, or the constant buying and selling of private equity. Even as other firms quickly looked to

slash costs and put people on furlough in the midst of Covid, we didn't need to do that, and were able to support all of our staff as we shifted to a primarily work-from-home approach.

As business owners, we are here for the long-haul. Kean continues to lead the board and is heavily involved in the key business decisions, whilst the Strategic Management Group (Poppy, Lauren, Ben and Jacob) focus more on developing the details and overseeing execution. We have a clear plan to drive long-term, sustainable growth, and we want all of you, our clients, to grow with us on that journey.

It has been a fantastic first 40 years for Whitechurch, and we look forward to everything the next 40 years will bring.

The Strategic Management Group

For information on our DFM offering please visit our website or contact a member of our Business Development Team:

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