

**WD&A****William Dixon & Associates Ltd**  
Professional Financial Advice

# WD&A Newsletter



## CELEBRATING 30 YEARS!

This year we have been celebrating a tremendous 30 years of looking after people's money. Will Dixon founded the business in 1992 as a sole trader, and we are now a much larger practice, looking after more than £100m of our client's assets. Throughout 2023 we will be looking to build on the opportunities that the move to Hartham Park has given us, and we hope that our policy of bringing in younger advisers over recent years, will ensure that WD&A are able to advise our clients for further 30 years.

## WD&A REBRANDS

To keep in fitting with our modern and forward-thinking vision, we have given WD&A a bit of a facelift. You will notice our website [www.wdanda.com](http://www.wdanda.com) has had an overhaul, as has much of our client facing documentation. You will see more of this rolled out over the coming months.

## WE HAVE NEW PREMISES

To support our growth plans and new additional team members, we have relocated to the beautiful Hartham Park in Corsham (see above). Hartham Park gives our staff and clients a great working environment and gives us the space to expand our team further in the future. We would love to see you there so please do let us know if you'd like to come in and meet the team.

**ADVISER UPDATES:****Daniel Gratton**

As we are blessed with a growing business and client introductions, we have taken on a new Financial Adviser to join our team. Dan is a friendly and diligent person who has fit in well since joining us in the autumn of 2022. Dan is a fully qualified level 4 financial adviser, offering advice to our clients on mortgages, protection as well as pensions and investments. He joins us from a background of financial administration and financial services recruitment. Dan is our latest addition to the team and is yet another addition to our 'future proofing' strategy.

**Adrian Murgatroyd**

After a long and successful career in Financial Services, Adrian Murgatroyd, one of our senior advisers, retired in 2022. Adrian had been struggling with some health issues throughout 2022 and he reluctantly took the decision to retire in September. We have been working with Adrian to handover client servicing to the most suitable advisers in our team. We thank Adrian for his service, knowledge, experience, and personality that he has brought to WD&A over the years and we wish him all the best for the future.

## WD&A IS SELECTED FOR OPENWORK'S GROWTH INITIATIVE

We were delighted this year to be selected, as one of only four, for Openwork's growth initiative. Openwork is one of the UK's largest financial advice networks with over 4,500 advisers. To be selected for this is a huge achievement and testament to the work we do with our clients.

## GOOGLE REVIEWS!

As part of our new digital strategy, we are asking our clients if they could be ever so kind and leave us a review on Google. If you have appreciated the work we have done together, helping us by leaving a review at <https://g.page/r/CU0Nv4HldylwEBI/review> would be much appreciated.

We hope you have found this newsletter useful and informative, if you have any questions or would like to discuss anything, please do not hesitate to get in touch.

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