



## Important News from Our Chairman

*This is a transcription of the video announcement available on our website:*

<https://chestertonhouse.co.uk/important-news-from-our-chairman/>

I'm writing to you in my capacity as Chairman of the Chesterton House Group to tell you about some changes to our businesses that you need to know about, including some new members of the Board of our Financial Planning business, and a change of ownership of our accounting and legal practices. Firstly, though, I'd like to reflect on our business journey so far.

### **Looking Back on 40 Years in Business**

It's 40 years ago this year since I first started in business, and over the years we've seen many changes. When I began there was no financial services regulation, and you didn't need any qualifications or training to give advice on complex financial matters. I set out to do things differently, and along with our team at Chesterton House we've built a business we can be proud of.

Over the years we've helped very many people to achieve financial security and genuine peace of mind when it comes to their money. Indeed, we've become one of the leading financial planning firms in the East Midlands and not only that, but we've earned respect within the financial planning profession, for our innovative approach, our high levels of customer care and for our expertise. Our clients love our unique values-based service, and I know that because we ask them, and they tell us so.

### **Why We Do What We Do**

We realised many years ago that offering a full financial planning service meant not only helping you to get the most from your money, but also to be able to organise your financial affairs so that you don't have to worry about whether you've got enough cash this month, whether your tax return is in on time, or how to lay your hands on that important legal document that is never where you left it when you need it.

It was a natural fit for us to start our own accounting practice, Chesterton House Accounting Services, to help people firstly with tax returns, then later with more complex tax planning, and now with a full range of business and personal services which have helped our clients to develop both their financial and business plans and to create their own wealth through their enterprise and their own efforts. We followed that by adding a legal practice to our business, Chesterton House Legal Services, helping people to create wills, powers of attorney, and more complex estate planning involving trusts, family investment companies and a whole range of other areas. When we had the opportunity to acquire one of the UK's oldest legal practices, Woolley Beardsleys & Bosworth which amazingly has its roots going back to 1732, we took it and it became part of our group. So now we had three businesses all under common ownership.

## Planning for the Future

I've had a fantastic career in financial planning, and I've loved every moment of it, and it's not over yet! But we do have to appreciate that none of us is getting any younger. My fellow business owners, Richard Urwin and David Wright, have been pondering for some years about how we take our businesses forward in the future, ensuring that we can continue to deliver the same brand of personal service, the same high levels of expertise, and the same outstanding client satisfaction that sets us apart from our peers.

We live in a time of great change, and as business owners we need to embrace that change and ensure that it is working for the benefit of our clients. So how can we best achieve these goals?

## A Strong Leadership Team

We're working on a number of initiatives at the moment with the aim of ensuring that our core proposition and our own involvement in it can continue for the foreseeable future whilst also going about transitioning those businesses to the next generation. So I'm delighted to tell you that I've got two very significant changes to tell you about, but before I do that I'd like to introduce you to the members of our financial planning company Board.

In making our plans for the future we've been building a strong management team with the skills and enthusiasm to take the business forward.



As well as myself and Richard Urwin who have served as directors for many years, we've appointed Rachel Kitching Burrows as Managing Director of Financial Planning. Rachel is no stranger to Chesterton House, in fact she worked as my paraplanner early in her career before leaving to pursue a role in senior management. She rejoined us in June 2022 and was appointed to MD last July.



David Wright is also very familiar with Chesterton House having been Managing Director of Woodgate Financial Planning Ltd, our successful joint venture business with Moss solicitors for the last 22 years. Following the merger of Woodgate into Chesterton House David joined our board in 2023.



Dawn Hubbard has worked for Chesterton House for 23 years now, firstly in our Admin team, and more recently specialising in personnel matters. Dawn was appointed to our board as HR director in July last year.



Jon Potter joined us in May 2021 as our Compliance Manager, with the job of keeping us all in line. He did such a good job of it that he was also appointed to the board last July.

So you can see that we have a strong line-up of people with a huge amount of experience in their roles, and we're very confident in their abilities in taking the business forward. We'll be making further

appointments over time to continue to strengthen our team, and we'll let you know about changes as they happen.

And of course, Richard and I will be around for a few years yet – we can't keep away! We'll be helping our team to stay focused on what our business is really good at – delivering comprehensive financial planning to our clients – whilst continuing to deliver an all-round service encompassing the other disciplines within our group – namely, accounting and legal advice, as part of our overall proposition.

### **Transitioning Chesterton House Accounting Services**

I'm pleased to tell you today that we have made the first step in our transition by transferring our accounting business to the two individuals who have helped develop it to where it is today.

Amarjeet Singh and Paul McGrath have worked with us from the early days and they've always shown huge dedication to client care, expertise and long-term service. We are very confident that the business is in safe hands with them running it. Amarjeet and Paul are well-known to our existing clients, and they are looking forward to continuing to serve you with their existing brand of client care and expertise.

Chesterton House Accounting Services will continue in exactly the same vein as it has been working up to now with the same name, the same people and the same ethos. But the ownership has changed, and we've been delighted to be able to make this transition which we are confident is in the best interests of our group. I know that you will join with me in wishing Amarjeet and Paul every success in the future and we look forward to continuing to work with them in the way that we've done successfully for the last 13 years.

### **Transitioning Woolley, Beardsleys & Bosworth**

I can also now tell you that we have, very recently, agreed to another significant change. After very careful consideration we have come to the view that the best interests of the clients and staff of Woolley, Beardsleys & Bosworth, our legal business, is in finding a partner with the resources, ethos and commitment that are needed to take the business forward whilst building on the strong tradition of expertise and personal service that we have established over the years.

I am therefore delighted to tell you that as from the close of business on 6th June 2025 we transferred the practice of Woolley, Beardsleys & Bosworth Solicitors to Rothera Bray. From that date the practice will trade as Rothera Bray LLP (incorporating Woolley, Beardsleys & Bosworth LLP Solicitors).

Rothera Bray are a substantial legal business with 7 other offices across Leicestershire, Nottingham and Derby. You can find out more about them at [www.rotherabray.co.uk](http://www.rotherabray.co.uk).

The merger will mean that we are able to offer Woolley Bees clients a much wider range of services whilst continuing to work closely in partnership with our Financial Planning and Accounting teams where appropriate.

All of the staff at Woolley, Beardsleys & Bosworth will be joining the merged firm, and they are all looking forward to continuing to work with you and build on the relationships that they've established over the years.

## Looking Ahead

All of our teams are excited by these changes, which without doubt open up new possibilities for them to grow, and for you, our client, to experience an even wider range of services with the assurance that the central ethos that underlies everything we do remains strong.

At times of great change it's very reassuring to know that some things remain constant. Our focus is on keeping on delivering the great results you've come to expect from us, and we look forward to doing that for a long time to come.

I hope that you will welcome these changes, but if you have any questions at all please don't hesitate to speak to your usual contact at Chesterton House, or if you prefer you can email me directly at [andy.jervis@chestertonhouse.co.uk](mailto:andy.jervis@chestertonhouse.co.uk) and I'll respond to you personally.



Andy Jervis  
*Founder & Chairman*