

Colmore Partners completes deal for financial planners

11th November 2022

Colmore Partners, has continued its expansion with the acquisition of a well regarded firm's clients.

We have completed a deal for Clear Solutions (Financial Planning) Ltd, which extends our presence in the Midlands and further grows our portfolio of clients.

Clear Solutions specialises in retirement solutions and investment planning. The fully independent firm was founded twenty years ago by Tony Wynne, who has joined Colmore Partners as a consultant during the transition process.

Richard Meek, Managing Director of Colmore Partners, said: "We are very pleased to have completed this acquisition. Tony Wynne has built a loyal client base over many years and wanted to make sure that they are serviced by a firm that will act in their best long-term interests. He had the option to sell the business to a large financial institution but chose Colmore Partners due to our reputation for doing things properly, with a proposition and level of service to match."

Tony Wynne said: "Following discussions with a number of firms, I decided to team up with one led by Richard Meek, who is a chartered financial planner I have known and worked with for over 20 years. The service, expertise, values and culture of Colmore Partners is very similar to mine and I am confident they will offer clients the highest quality advice and personal service. I look forward to working with Richard and his team to ensure a smooth transition."