

jch: investing with integrity for your future

JOHN Hebblethwaite has a passion for making clients' money work for them.

As his companies, jch:investment management limited and jch:pension management limited, celebrate their tenth anniversary that love of helping people realise their dreams and aspirations has not diminished. "We get a great deal of satisfaction from helping clients achieve their life goals, whether it's ensuring they can put their children through university or enabling them to completely change their lifestyle," said John, chief executive officer.

Putting clients' needs first sits at the heart of the business, which, fundamentally, provides face-to-face investment, pension and financial planning advice.

The company, based at 1 Henley Way, Lincoln, now looks after tens of millions of pounds for satisfied clients and its development over the last decade reflects the ethos of rational and balanced growth that it nurtures for them.

"Time and again jch: have proved that they can provide excellent advice, supported by very good service. I feel confident that my clients are in a safe pair of hands if they have the jch: team on board to advise on their finances."
Stephen Collins, Partner, Saffery Champness LLP

Working with families, companies, trusts, charities and pension schemes John set up jch: after operating as the managing director for the Lincolnshire arm of an international financial company and building up similar operations for other businesses.

"Over the years I had gained a great deal of experience in the sector and thought the time was right to set up an independent investment management company," explained John, who is both a Certified Chartered Financial Planner and a Chartered Wealth Manager, a unique combination for Lincolnshire.

"We knew how we wanted to develop the business - that was, and is, through building strong and lasting relationships with our clients." Joining John in the new venture were Nikki Johnson, Cat Hall and Alan Willmont, who helped direct the business focus on exceptional client service and the best possible financial planning.

That focus has been maintained as the team has grown to include specialists with an abundance of financial planning experience and skills, which are used to provide clients with quantifiable benefits.

"Our people are very definitely our biggest asset and building the right team has been pivotal to our growth," said John.

"Our strategy has not been to just grow the team and get as many

"My clients love the confidence they get from dealing with John and the jch: team. Their integrity and Chartered status is at the heart of this. I have long been impressed by John's commitment to constructing risk managed portfolios using funds designed to reduce costs with the sole intention of increasing their client's investment returns. It is good to deal with people we like and who actually put clients first".
David Wood, Under Sheriff of Lincolnshire, Partner, Langleys Solicitors



clients in as possible, because if you have thousands of clients you can't look after them properly.

"It's all about getting the balance right. We're happy that we now have the right people who have the right ethos and the integrity to make our clients feel their future prosperity is secure. It's a really great team."

The jch: team typically help clients whose financial portfolio is more than £250,000 start to achieve financial independence and future proofing existing wealth once it has been accumulated.

"Everyone's circumstances are different, so it is vital we get to know our clients so we can help them make the right choices," said John. The company's independent status means it can advise clients about products and services across the whole financial sector ensuring these are bespoke to their needs.

Working with clients' other professional advisers such as solicitors and accountants is also integral to effective stewardship of their financial plans.

"We are proud to have worked with John for a substantial number of years and have built a strong relationship over those years. The skilled and professional team at jch: have always provided comprehensive expert advice on financial planning and investment matters to both our company and our clients. We fully recommend jch: investment management and the services that they provide."
Richard Welsh, Director of Saul Fairholm Accountants Ltd

Investments may be central to any future proofing of wealth, but they can make people nervous as it is difficult to predict how they will perform, but jch: has a very impressive track record when it comes to investment through being rigorous in their research and monitoring.

The company has many longstanding happy clients who have entrusted their wealth through some very difficult stock market corrections which has helped them sleep easy, achieve their life goals and help family members or employees.

Being such a significant factor in someone's future financial well-being is rewarding for the whole team and it has led John to launch a specialist service for charities.

"It was a light bulb moment - I thought that we could really do some good. There are different financial rules and regulations for charities and quite often there are lay people who are trying to negotiate these."

Main picture - John Hebblethwaite (front centre) with the jch:im team (clockwise from top right) Karen Lang, Nikki Johnson, Cat Hall, Caroline Catlin, Melanie Everett, Anja Snook, Bridget Playford, Diane Harvey, Susan Lovell and Alan Willmont. Picture: Stuart Wilde. Right: The new branded monolith on the Doddington Road approach to the jch: offices on Henley Way (below).



jch: investment management offer a full range of initial planning and proactive ongoing reviews, including:

- Investment planning for capital preservation, income or growth
- Retirement planning for individuals and companies
- Specialist pension transfer reviews for defined benefits pensions
- Estate planning solutions to protect family wealth and minimise tax
- Specialist charity & trust investment planning
- Small Self Administered Schemes (SSAS) – through sister company jch: pension management
- Tax planning mitigation strategies for income tax, capital gains tax, corporation tax and inheritance tax
- Protection planning for families and businesses

