



The Penny Group, London

Adam Roberts

The Penny Group, a CII-chartered national advice firm, has grown considerably over the past year, adding more than 200 clients and £100m assets under the leadership of partner Adam Roberts.

Market volatility has made clients nervous, but they have been reassured by the firm's webinar series, frequent emails and increased face-to-face meetings. A quarterly newsletter highlights the state of the market, gives investment updates and addresses other relevant topics.

Close relationships are being maintained and support for clients is being prioritised through these tough times. The firm has moved to a new office with an increased number of client meeting rooms.

As ever, charity has been a focus this past year, with The Penny Group supporting the Red Cross and the Disaster Emergency Committee's Ukraine Appeal, among others.

Succession has been planned for. A key area of growth has been new experienced advisers training up junior staff and passing on their client banks as they prepare for retirement.