06 June, 2024

Newcastle Financial Advisers Makes Key Appointment

Newcastle Financial Advisers has appointed Kerry Rothwell as Performance and Development Partner.

Newcastle Building Society introduce clients to Newcastle Financial Advisers, who provide accessible advice on investment, retirement, inheritance tax planning and protection advice through the Society's network of branches across the North East, Cumbria and North Yorkshire.

With 25 years' experience in financial services, Kerry joins Newcastle Financial Advisers from Fairstone Financial Management Limited where she was Head of Business Practice. In her new role, Kerry will support the professional development of Newcastle Financial Advisers' team of advisers and the wider operations, support and paraplanning teams, while also focusing on refining the businesses' systems and processes and ensuring colleagues are leveraging technology to maximise efficiency and minimise risk.

Kerry's experience with acquisitions will also support the Society's ambition to acquire new financial advice businesses as part of its wider strategy for growth and ensuring that as many people as possible in the region have access to trustworthy financial advice.

Kerry said: "Ensuring that we make high quality financial advice as accessible as possible to everyone is a top priority for Newcastle Building Society, and our colleagues are a huge asset to the business in realising this ambition. That's why I'm particularly looking forward to supporting the development of the whole team at Newcastle to ensure we deliver consistently high standards of customer service throughout all the communities we currently serve in the North East, Cumbria and North Yorkshire and with an eye on expanding in to new communities also."

Iain Lightfoot, Managing Director of Newcastle Financial Advisers, said: "Kerry's appointment brings a valuable set of knowledge, skills and experience to the Newcastle Financial Advisers team. I am delighted to have her on board and her addition to the business will help to further drive and deliver high quality financial advice that is personalised, authentic, reliable and thereby makes a real difference to our customers' lives."

Newcastle Financial Advisers Ltd is a subsidiary of Newcastle Building Society, and provides financial advice across its 31 Newcastle Building Society branches plus one dedicated financial advice location.

For more information on Newcastle Financial Advisers visit: https://www.newcastle.co.uk/

-ENDS -

.

For further information on Newcastle Building Society, please contact:

Chris Hoy – External Communications Manager
M: 07483 452 461
E: chris.hoy@newcastle.co.uk
Jeremy Mountain – External Communications Lead
M: 07977 290 598
E: jeremy.mountain@newcastle.co.uk

About Newcastle Building Society

Newcastle Building Society is the biggest building society in the North East, with a network of 31 branches and assets of more than £6.2bn. We've been here for our members for over 160 years.

As a leading local employer, we're committed to growing our region's talent and being a great place to work where people can realise their potential. We hold Platinum IIP and won the Excellence and Positive Impact Award at the 2022 CIPD North East of England HR&D Awards. We have been named Regional Building Society of the Year for seven consecutive years from 2017 – 2023 by What Mortgage? and also won Best Overall Personal Finance Brand at the Personal Finance Awards 2023/24. In 2024 Newcastle Building Society became the first UK business to receive international accreditation for mutual value measurement, recognising our ongoing commitment to creating value for its members and communities.

We help people to own their home, to save and to plan their finances through our range of products and services. We believe in the role of the high street at the heart of our communities and, as our branch network grows, we are increasingly proactive in making financial information and financial advice accessible across our regions.

Financial Advice is provided through our Newcastle Financial Advisers Limited subsidiary. Face-to-face financial advice is available at each of the Society's 31 branches plus a financial advice-only location in Pickering, North Yorkshire. For the third year running, Newcastle Financial Advisers has been awarded Top Rated Firm status by VouchedFor - the UK's leading review site for Financial Advisers.

We're dedicated to helping our communities make positive changes; since 2016 the financial support through grants and donations from the Newcastle Building Society Community Fund at the Community Foundation to benefit local causes has surpassed £1.7m. Our total community contributions in 2022, made up of grants, match funding, and our ongoing partnership donations, was more than £544,000.

Newcastle Building Society is committed to creating a culture of belonging, where people can bring their whole self to work and be respected and valued for who they are. Our colleague-run networks include the Race Network, LGBTQ+ Network the Disability and Awareness Network, Women in Leadership Network, Menopause Network and Parent and Carers Network, all of which help steer Diversity, Equity and Inclusion policy within the organisation.

www.newcastle.co.uk

Newcastle Building Society Principal Office: 1 Cobalt Park Way, Cobalt Business Park, NE28 9EJ.