

## A golden 50 years developing impactful advice

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In an age defined by short-termism, few are successful in playing the long game. It is a truly momentous milestone for anything to last 50 years these days.

Alexforbes Offshore, however, has understood from the very beginning that providing advice and financial solutions can have decades long impact on the lives of families and companies alike. Building trusted, long-term relationships with clients has been at the heart of the company's success in Jersey since 1975.

The world has changed significantly in the last five decades. Financial service companies have had to evolve, mature and grow to survive. 50 years ago in Jersey, the financial services industry was in its infancy, regulation was very light, UK insurance companies and banks dominated the local market, clients saved more regularly and only dealt with who they knew.

Since that time, Alexforbes Offshore has been on an evolution of its own. Originally the company started life as a general insurer and then quickly developed into a fully-fledged insurance and financial service provider. In 1997 its investment services business, now called Alexander Forbes Investments Jersey, was inaugurated, adding another vital string to their bow. An acquisition spree in the early 2000s saw Alexforbes Offshore take on Martin Gray, Shepherd Limited and Marsh operating in Jersey, Guernsey and the Isle of Man. The Alexforbes Group divested its general insurance operations to Locktons, and this was the start of the new focus on corporate and wealth advisory services which continues to this day.

Using the backing of its established South African parent (who themselves celebrate their 90th anniversary this year) Alexforbes Offshore has ensured that 50 years of service hasn't happened by chance. Remaining a steadfast pillar of excellence and innovation in financial advice, has meant keeping up with the tremendous changes in the financial services landscape and advancing with the times.

Managing Director, Adrian Peacock, explains the firm's legacy and what he thinks the next 50 years will hold.

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consistently evolved the way we provide financial advice to clients, moving from a very product driven approach to satisfy a direct need in the early years, to a much more holistic view of financial wellbeing now," he said.

"We appreciate the current concerns for every Jersey resident, that money worries can have a detrimental effect on mental health. By helping people recognise their relationship with money, understand the value and discipline of saving over time and identify critical money pinch points throughout their life, we can help them plan for better outcomes."

"Alexforbes Offshores encourages individuals to define their financial objectives for their future lives, whether its planning for retirement, home ownership or sending children to further education. We use our six steps to financial wellbeing approach to help prepare individuals for their future lives."

"A key component of our success has been our multi-manager investment solutions using the benefit of our experienced investment team in South Africa together with our Global strategic partners, Mercer, to deliver consistently outstanding performance. Our range of investment solutions are designed to meet the varied needs of our clients. The focus is on sustainable growth, which aligns to our overall company ethos."

"Looking ahead, we like to think that celebrating our 50th anniversary Alexforbes Offshore demonstrates our commitment to remaining true to our core values of providing insight, delivering advice and having a positive impact on people's lives. Artificial Intelligence, climate change, political uncertainty and changes in regulation are undoubtedly part of our, and therefore, our clients' future.

"Whilst we must continue to evolve, embrace new technologies and keep adapting, one thing never changes for us: It's about having positive, meaningful and enduring relationships with our clients. With a forward-looking collaborative approach, we are well-positioned to navigate the challenges and opportunities of the future, so are intent on being here for at least another 50 years!"

In essence, Alexforbes Offshore's 50th anniversary is a golden jubilee that celebrates a rich legacy, builds on past achievements, and looks forward to a promising future. It is a testament to the company's enduring commitment to the highest standards of advice and its unwavering dedication to serve the financial wellbeing needs of their clients.