E-NEWSLETTER

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LAKE SIDE FINANCIAL SOLUTIONS

Happy New Year

As we enter 2021, we wanted to get in contact to update you on the last 12 months at Lakeside. Last year was, without doubt, a challenging year for us all which makes it even more important to look back at all that we did, and what we learnt in 2020.

What we did for our clients in 2020

COMMUNICATION

- **Regular quarterly updates**
- **Annual review questionnaires**
- **Tax Year End reminders**
- **5 Covid updates**
- **2 prompts to take advantage of market volatility**
- **1 additional market commentary**

In addition to more than 13 written communications, we increased our outgoing telephone contact.



INVESTMENT

- **Ongoing Investment Committee Meetings**
- **Quarterly asset allocation adjustments**
- **4 fund changes**

We are very proud to have been able to help steer clients successfully through the unprecedented market conditions in 2020. This resulted in all our client portfolios making gains in the past 12 months despite the market volatility.



Our portfolios have increased by between 5% and 21% depending upon the attitude to volatility (risk profile) and investors' personal circumstances.

REMOTE WORKING

- **Restructured our staff to work from home**
- **Moved our face to face meetings online**

We are proud of the service standards our team maintained during a very difficult year of home working, home schooling and a number of absences due to coronavirus.



We would like to thank all our clients for your support as we made significant changes to our business last year.

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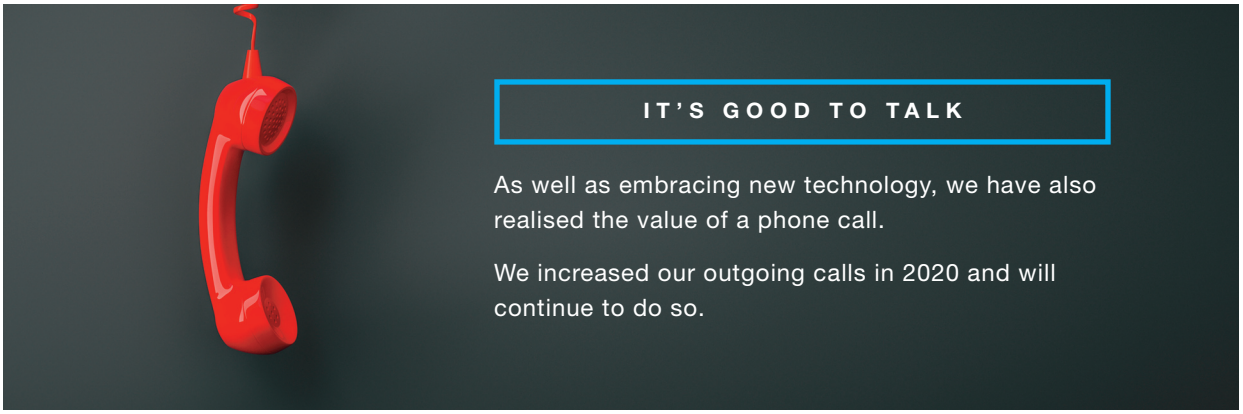
What we learnt in 2020

ONLINE MEETINGS WORK

Meeting using online services like ZOOM mean less time spent travelling, and more time speaking to clients and managing investments.

Feedback from clients has been overwhelmingly positive and as a result we will continue to use video calls as a key element of our service strategy in the future.





IT'S GOOD TO TALK

As well as embracing new technology, we have also realised the value of a phone call.

We increased our outgoing calls in 2020 and will continue to do so.

STRATEGY & DISCIPLINE ARE KEY

We have always believed this, but 2020 was proof if it were ever needed. A good investment strategy, executed in a disciplined manner is the best way to achieve long term returns.



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AN OPTIMISTIC OUTLOOK

We never want to go through 2020 again, but in many ways it has been a huge success story for Lakeside and, more importantly, for our clients.

We may not be out of the woods yet, but there is a great deal to be optimistic about in 2021.

For our part, we are excited to implement a number of improvements to our investment strategy, communications and many other areas in the coming year.

As always, if you have any questions, or need assistance with any area of financial planning, please don't hesitate to get in touch.

Kind Regards,

Matthew Hibbert

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