A history to value

OUR MISSION: TO IMPACT THE LIVES OF OUR CLIENTS, AND THE PROFESSION OF FINANCIAL PLANNING, FOR THE BETTER, FOR EVER.

Paradigm Norton | for life

1980 · 1990 · 2001 · 2005 · 2006 · 2007 · 2008 · 2009 · 2010 · 2011 · 2012 · 2013 · 2014 · 2015 · 2016 · 2017 · 2018 · 2019

1/ NORTON PARTNERS WAS ESTABLISHED IN 1980 BY DAVID NORTON, CREATING ONE OF THE FIRST FEE-BASED FINANCIAL PLANNING FIRMS IN THE UK.

2/ EARLY 1990'S BARRY HORNER MET DAVID NORTON OF NORTON PARTNERS AND, THROUGH A SHARED VISION OF FINANCIAL PLANNING, FORMED A RELATIONSHIP THAT WOULD SHAPE THE FUTURE.

3/ PARADIGM CAPITAL MANAGEMENT WAS ESTABLISHED IN 2001 BY BARRY HORNER AND WILLIAM PRATT FOR INDIVIDUALS SEEKING TO EMBRACE THE FEE ONLY CONCEPT OF FINANCIAL PLANNING.

4/ IN 2005 PARADIGM NORTON WAS ESTABLISHED FOLLOWING THE SUCCESSFUL MERGER OF NORTON PARTNERS AND PARADIGM CAPITAL MANAGEMENT.

5/ THE ANNUAL OFFSITE TEAM DAY WAS INITIATED IN JUNE 2005, NOW A FOCAL POINT OF THE YEARLY TEAM BUILDING SCHEDULE TAKING PLACE EVERY JUNE.

6/ THE INVESTMENT COMMITTEE WAS ESTABLISHED IN 2006 TO DEVELOP OUR INVESTMENT POLICIES AND STRATEGY.

7/ IN 2006 PARADIGM NORTON WON THE CITYWIRE SOUTH WEST AWARD FOR THE FIRST TIME.

8/ PARADIGM HOUSE, THE BRISTOL HEAD OFFICE, WAS PURCHASED IN 2007 AND THE TEAM MOVED TO THEIR NEW HOME, JUST FOUR MILES SOUTH WEST OF BRISTOL CITY CENTRE.

9/ ALSO IN 2007 THE PARADIGM NORTON CLIENT BOARD WAS ESTABLISHED TO GUIDE THE BOARD WITH DECISIONS ON SERVICE, COMMUNICATIONS AND DEVELOPMENT PLANS.

10/ FINALLY IN 2007 THE PARADIGM NORTON TRUST WAS FORMED.

11/ IN 2008 BARRY HORNER WAS ELECTED TO SERVE AS PRESIDENT OF THE INSTITUTE OF FINANCIAL PLANNING.

12/ IN 2009 WE WERE AWARDED THE MONEY MANAGEMENT AWARD FOR BEST INVESTMENT ADVISER, A RECOGNITION OF THE WORK ACHIEVED BY THE INVESTMENT COMMITTEE.

13/ MATT FOWLER JOINED THE TEAM IN 2009 FROM KPMG TO MANAGE OUR OPERATIONS.

14/ PARADIGM NORTON WON THE MONEY MANAGEMENT AWARD FOR BEST RETIREMENT PLANNER IN 2010 REFLECTING THE WORK OF OUR RETIREMENT PLANNING COMMITTEE.

15/ IN 2010 A DEVON OFFICE WAS ESTABLISHED WHEN PARADIGM NORTON ACQUIRED DAVID JONES FINANCIAL PLANNING.

16/ PARADIGM NORTON ACQUIRED ANNING & CO CHARTERED ACCOUNTANTS IN 2011 ENHANCING THE FIRM'S ABILITY TO OFFER A COMPREHENSIVE FINANCIAL PLANNING AND PERSONAL TAXATION SERVICE.

17/ IN 2013 PARADIGM NORTON WAS REBRANDED TO REFLECT THE GROWING BUSINESS AND REFRESH THE LOOK OF THE FIRM.

18/ MATT FOWLER WAS APPOINTED AS A DIRECTOR OF PARADIGM NORTON IN 2013.

19/ PARADIGM NORTON GAINED CHARTERED FINANCIAL PLANNER STATUS IN JUNE 2013.

20/ DIRECTION FINANCIAL PLANNING, A FINANCIAL PLANNING PRACTICE IN TAUNTON, WAS PURCHASED BY PARADIGM NORTON IN OCTOBER 2013.

21/ AND IN 2013 THE PARADIGM NORTON GRADUATE PROGRAMME WAS LAUNCHED.

22/ IN 2014 BARRY HORNER WAS INVITED TO JOIN THE FINANCIAL PLANNING STANDARDS BOARD (FPSB).

23/ KEVIN GREGORY WAS APPOINTED AS THE FIRST NON-EXECUTIVE DIRECTOR WHO JOINED THE BOARD IN 2014.

24/ PETER OSBORNE JOINED THE COMPANY AS COMMERCIAL MANAGER IN 2015 TRANSITIONING HIS CLIENTS ACROSS TO THE TEAM.

25/ IN 2017 PARADIGM NORTON ACHIEVED THE CENTRE OF FIDUCIARY EXCELLENCE (CEFEX) ACCREDITATION, AN INTERNATIONALLY RECOGNISED STANDARD OF GENUINE FIDUCIARY EXCELLENCE IN OUR RELATIONSHIP WITH OUR CLIENTS.

26/ IN MAY 2017 PARADIGM NORTON APPOINTED THE 5TH GRADUATE TO THE GRADUATE SCHEME.

27/

28/ IN DECEMBER 2017 PARADIGM NORTON MERGED WITH THE RED HOUSE TO FORM OUR LONDON OFFICE.

29/ DURING 2017 THE FIRM COMPLETED A VALUES REVIEW CONSULTING CLIENTS, THE TEAM, THE CLIENT BOARD AND SUPPLIERS. THE REFRESH WAS COMPLETED BY THE NEWLY CREATED CULTURE AND VALUES TEAM.

30/ IN 2018 BARRY HORNER BECAME CHAIR OF THE FINANCIAL PLANNING STANDARDS BOARD (FPSB).

31/ IN MARCH 2019 PARADIGM NORTON BECAME AN EMPLOYEE OWNED BUSINESS (EO).

32/ IN JUNE 2019 WE WON, FOR THE SECOND TIME, THE MONEY MARKETING ADVISER FIRM OF THE YEAR AWARD.

33/ PARADIGM NORTON BECAME A CERTIFIED B CORP FIRM IN SEPTEMBER 2019

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