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John Morton takes senior executive roles across the Vintage group of companies

The Vintage group of companies (Vintage), one of the UK's premier independent financial advisory and wealth management businesses, with assets under advice and/or management in excess of £1.25 billion, has appointed John Morton as CEO of Vintage Wealth Management and as Executive Director of Vintage Asset Management, Vintage Corporate and Vintage Health. His principal remit is to help oversee the continuing significant growth and development of the individual businesses within the group.

Last year John established Broad Street Asset Management and will be integrating the fledgling business into Vintage with a number of those currently working there joining the group. In 2009 John established European Wealth which in five years acquired six businesses in five different countries and was floated on the AIM market of the London Stock Exchange when funds under management reached £1.8 billion.

Prior to that, John's successful and varied City career encompassed Abtrust (subsequently Aberdeen Asset Management), latterly as a Director of Abtrust Fund Managers and establishing an investment management and financial planning business for a firm of solicitors which demerged to become Ashcourt Holdings. Over the following four years, six acquisitions were completed and the business was floated on AIM. On its subsequent acquisition, John remained as Group CEO and continued to build the business with a further 11 acquisitions in three years.

Geoffrey Hartnell and Robert Stein, co-founders and senior executive directors across the Vintage group of companies, said: "The Vintage group has grown significantly over the last few years and the time had come to make some critical decisions to ensure we can continue to develop the individual businesses, whilst also maintaining high quality client service in an ever-evolving industry.

"Apart from the recent additional office space acquired in Central and North London to help accommodate physical growth, the diversity of the group made it a challenge defining the senior executive support that was required to take us forward over the medium term. It was clear that we needed to appoint a CEO with an exceptional pedigree, combined with a successful track record of

overseeing significant change and managing a rapidly growing suite of businesses. In John we have found that expertise and commitment, allowing him to take full advantage of the firm foundation that has been built.

“We welcome John and are confident that, together with our existing team and new colleagues from Broad Street, we are now well positioned to deliver what we do best – adding value to our clients, professional introducers and long-standing joint venture partnerships, whilst positioning the group for an outstanding future”.

Both Hartnell and Stein remain as Directors and Shareholders of Vintage and will continue to be actively engaged in all aspects of the business.

John Morton added: “This is an exceptional opportunity for myself and everyone involved across the four core businesses of the Vintage group of companies to build on the results that have been achieved over the last 15 years, delivering highly respected work for our clients, both individuals and institutional.

“My initial focus will be to assess the systems, procedures and protocols observed by the business and then to improve the efficiency and profitability of the group together with growing it to the next level. It is never easy to pass on the baton of leading a personally established enterprise such as this, but I very much look forward to delivering on the high expectations and trust placed in me by Geoff and Robert”.

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Notes to editors:

The Vintage group of companies is one of the UK’s premier independent financial advisory and wealth management businesses. Established in 2004 following a merger between two eminent independent financial advisory firms, Aztec Financial Limited and Bond & Stein plc, Vintage has assets under advice and/or management in excess of £1.25 billion, with an annual turnover in excess of £9.5 million*.

With 130 employees, including over 20 FCA fully-regulated individuals, operating from three offices across London, Vintage’s four group companies - Vintage Wealth Management, Vintage Corporate, Vintage Asset Management and Vintage Health - provide a full holistic wealth management service including:

- Independent Financial Advice
- Private Medical Insurance
- Employee Benefits
- Mortgages
- Asset Management

Clients range from individuals, families and SMEs through to international, multi-site quoted companies with upwards of 5000 employees. Vintage has also established successful joint ventures with several prominent London-based accountancy and legal firms, including white labelling of its financial service offering for three of the top 75 UK accounting firms.

For further information, see:

- www.vintagewealth.co.uk
- www.vintageassetmanagement.co.uk
- www.vintagecorporate.co.uk
- www.vintagehealth.co.uk

(*as at 1 November 2019)