Lee Blissett

Testimonial

Partner Lee Blissett FPFS tells us about his journey with St. James's Place, from joining us over four years ago to now and how he utilises the Private Clients service to best support his high-net-worth clients.

The Private Client Division is a dedicated team within St. James's Place (SJP) that helps Partners engage, advise and service private clients.

Meet Lee

My financial advice career began in 1990, 26 years before I joined St. James's Place. Before joining, I had very little knowledge of the SJP proposition, let alone anything aimed at private clients. My only experience and perception of St. James's Place were high initial and annual costs and early withdrawal charges. I had come across a couple of St. James's Place Partners with many years' experience who were clearly professional and good at their job.

The first test of whether I had made the right decision was the day I resigned. I have never felt so relaxed quitting a job. Being self-employed did not phase me as I had been self-sufficient and run my book as if it was my own business for many years. I am self-motivated and work well on my own, under my own steam. St. James's Place offered a cash flow package for the first year, and I figured that if I tried and failed, at least I knew that one year's cash flow would be the limit of my liability. By comparison, the cost of setting up a new Harley dealership would have put everything I owned at risk. The autonomy and idea of building my own business appealed and St. James's Place had the scale, support, and structure I was looking for.

How do you work with the St. James's Place Private Client Team?

The team helped me understand how St. James's Place could help me. I am very proud and protective of the relationship I have built with the St. James's Place Private Client team (I call them my A-Team). Nothing is too much trouble and they have helped me secure and service some very high-value relationships.

The Private Client Proposition

The proposition alone, no matter how broad and holistic, will not generate business in the Private Client space. You cannot join St. James's Place and expect the Private Client team to do all the work for you. But if you do the work, getting to truly understand your clients and present the case well, the Private Client team will add value.

> ***I genuinely love my career. I have never woken up dreading the day ahead.***

Relationships are incredibly important, and time invested in getting to know the Private Client team will pay dividends later. It is my intention (my business proposition) that all my clients receive a Private Client service. Most of this I can and do deliver myself; but without doubt it is complemented and strengthened by the St. James's Place Private Client proposition.

How has your life changed since joining St. James's Place?

I genuinely love my career. I have never woken up dreading the day ahead. I am proud of what I have built and the clients who have entrusted me with their family wealth. I achieved my five-year plan in 18 months and my wife was able to quit her job and join me as my Practice Manager. We work well together, enjoy enormous flexibility in our daily lives and the business continues to grow.

We are close to achieving our 10-year plan in four years. St. James's Place is a real business community (family) and for me, the right decision, the right organisation at the right time.

St James's Place

SJP13440 B1 (06/22)