



VouchedFor's 2025 Top Rated Financial Adviser Guide

Helping you plan a future that really adds up

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The power of a portfolio

Investing needn't be complicated: expert advice and a diversified strategy go a long way towards growing wealth

David Prosser

Are you an investor? You may not think so, but if you have any savings – from a few pounds in the bank to pension contributions at work – you have already started making investment decisions. While it's easy to be intimidated by the mystique surrounding investment, the secret boils down to consistency, discipline and common sense.

Seeking financial advice will help – but don't go looking for an investment guru, says James Reiss, CEO of wealth manager David James Wealth. "Find someone who will be a planner, rather than an investment adviser," Reiss says. "You'll still end up with a set of investments, but they'll be tailored to give you the best chance of achieving your financial goals."

It's a critical point, says Natalie Wright, UK head of family business at the accountant and financial adviser Forvis Mazars. "Investment is about managing your money so you're able to do the things you want to in the future, from supporting your family to retiring comfortably."

In practice, that means building a diversified portfolio: a set of investments chosen with your goals and attitude to risk in mind.

There are lots of options. People often think of investment as putting money into the stock market, but other opportunities include bonds (essentially loans to governments and other companies), property, commodities, infrastructure and cash.

Each of these investments – or asset classes – comes with a different risk and return profile. Some assets, including the stock market, have the potential to deliver higher returns over the longer term, but with more ups and downs along the way. Others are more suitable for shorter-term horizons because they carry less risk, but the return potential will also be lower.

The good news is you don't have to do all the work yourself. Most investors use investment funds to get exposure to the asset classes they want. These funds are run by professional managers who pool your money with contributions from other investors. You can put in a lump sum up front or make regular savings, and you're usually entitled to withdraw money whenever you choose.

Some funds are actively managed: the manager chooses the investments they expect to do best in a given asset class. Others are passive: they automatically track the performance of a specific index – the average performance across a particular stock market or set of investments. Funds that track the performance of the FTSE 100 index of the largest UK companies are a good example.



“*If you have any savings – from a few pounds in the bank to pension contributions at work – you have already started making investment decisions.*”

"An index can be thought of as a recipe in a cookery book," says Katya Nelyudova, head of sales EMEA at FTSE Russell. "It sets out the ingredients necessary to make a dish, together with the instructions to combine them. FTSE Russell produces the recipes that fund managers like BlackRock follow," she says. "But the index is not the dish itself – it's the guide. The rules of an index help produce the desired dish – a fund's constituents. Therefore, the right investment starts with the right index. And your choice of index really matters."

How, then, to build the right portfolio? This is where a financial adviser can help. They'll ask you why you're investing, then advise you on how to build a portfolio.

For example, if all your financial goals are long term (saving for retirement in 30 years), you can afford to be more aggressive. If you're going to need access to your money sooner (buying a house in three years), you need to be more cautious because you don't have time to recover from any setbacks.

Grasping this principle is the key to good investment planning, says Reiss. "Investment products are actually the last thing we talk to clients about," he says. "We start by understanding their objectives and work backwards." Advisers can also help with tax efficiency, he points out. For example, holding your investments inside an individual savings account (Isa) will shelter all income and profits from tax.

Some investors prefer to buy different funds to get exposure to each of the asset classes they're interested in. But another possibility is a multi-asset fund that holds lots of different types of investment all at once, explains Heather Christie, head of UK adviser sales at the investment manager BlackRock.

"A multi-asset fund is like a basket that holds different types of investments, such as stocks, bonds and real estate. This mix helps to spread risk, so if one investment doesn't do well, others might still perform better," she says. "A pre-built portfolio option, like a multi-asset fund, is particularly useful for investors who don't have the time or expertise to build their own portfolio."

Exploring new technologies can also help. There are a growing number of online platforms that will automatically suggest an investment portfolio based on the information you provide about your goals and your attitude to risk.

The bottom line? Investment is far more accessible than many people realise – don't be put off by the jargon or the mystique. With support from the right advisers and experts, everyone is capable of building an investment portfolio for their financial goals.

EXPERT GUIDANCE FOR LASTING GAINS

From tax efficiency to investment strategy, an accredited specialist keeps you on track and helps you avoid costly mistakes

Leah Milner

For those who have never used a financial adviser before, the idea of spending several thousand pounds per year or more for their wisdom might feel hard to justify.

But for millions of people it is money well spent, as research from insurance and investment firm Royal London shows two thirds of clients who pay for professional financial advice believe it delivers good or excellent value.

A good adviser should ensure you more than recoup the cost of their fees in the financial returns and cost savings that they help you achieve in the long run. Beyond this, other potential benefits are hard to quantify in pounds and pence – whether that is making sure your loved ones are financially protected should the worst happen or helping you avoid costly mistakes in times of market turbulence.

"Most people spend so much of their lives working – we are here to make sure they make the most of what they have and of their financial future," says Steven Pyne, chartered financial planner and managing partner at Holden & Partners.

"A good financial planner will work out where you want to be and the best way of getting there. But importantly, along that journey, they are going to make sure you do certain things and stop you from doing

others that might be detrimental to your financial wellbeing."

Priorities might shift as you move through your life and an adviser should help you make adjustments as needed to ensure you are on the right track. This means making the most of tax breaks, ISA allowances and paying enough into a pension.

Pyne says: "Unfortunately, for whatever reason, we often come across fairly sophisticated clients who are neglecting the basics. Everyone is time-poor in this day and age and a financial planner will add significant value here."

Enthusiastic investors can easily go off course without the guidance of a professional who understands risk and how to manage it by building a properly diversified portfolio. Katharine Ross, financial planner at Smith & Wardle, says: "We get clients who have started investing on their own. While it's great they have done something, they have ended up with an enormous portfolio of stocks and investments to keep track of and they are overwhelmed."

Another danger here is that investors end up with a portfolio that is not properly diversified so the risk is highly contingent on the fortunes of a particular country, sector or, worse, on an individual fund or company.

Because of employer share-save schemes it is common for investors to hold stock in companies where they work – meaning they are doubly exposed to both redundancy risk and investment losses should that business get into difficulty, Ross explains. Financial planners will encourage you to hold a wide spread of different investments to manage risk effectively.

Psychological biases and emotional reactions can also pose dangers for novice investors who try to go it alone. Luke Neves, a financial planner and associate director at The Penny Group, part of The Openwork



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Partnership, says: "We saw this when Covid hit and the markets tanked. Clients were panicked and thought they should cut their losses and sell their assets. We were talking them back from the brink to stop them from selling."

"Then in the space of six months from March 2020 to September 2020, we saw the market bounce back. Many investors who did not have a trusted adviser on the end of the phone may have made rash decisions and locked in those losses."

Financial advisers use software to help give their clients a 360-degree view of their pensions, investments and savings in one place. This makes it easier to manage risk across their portfolio. By working with an adviser, you can also use the software to make projections for the future and see whether you are on track to reach your goals – say, retiring at your chosen age with a certain level of income and no mortgage debt.

"These cashflow modelling tools paint a picture of what your financial future will look like and allow you to understand the impact of decisions you make now," says Ross. Once you have got a plan in place, your adviser will keep you up to date with regular check-ins, depending on your needs and market events. You should also be able to log in and view how your investments are doing at any time.

For Neves, peace of mind is an overlooked benefit clients gain from taking advice. "It is knowing you can sleep at night, having someone qualified in the field looking after your money. They are going to be on the other end of the phone if something goes wrong and can provide reassurance that everything is not as bad as it might seem. But equally, if changes are needed, they are going to be proactive and make tweaks to ensure you stay on track."

“*Professionals advise that the best way to manage risk is with properly diversified portfolio*”

Personal finances: the board game where everyone wants more pieces

How to make the most of your money in today’s Britain

Isas, investments and inheritance: experts weigh in on the best ways to maximise your cash in a transforming economy

David Prosser

All new governments make changes and the Labour administration that took office last July is no exception: it has already announced a raft of reforms that could have a significant impact both on your finances and your financial planning.

Taking the time to understand these changes and reacting accordingly is important, says William Stevens, head of financial planning at wealth management firm Killik & Co, but a good financial adviser should be able to help. “An adviser will look at how your long-term plans might need to change according to what’s happening in the short term,” he says.

First, the good news: Labour has so far stuck to its pledge not to increase income tax, national insurance and VAT rates, at least for individuals. That protects your post-tax earnings – and if you’re on a lower income, a significant rise in the minimum wage should also provide help.

However, November’s budget did introduce tax rises in other areas. Capital gains tax, payable on investment profits above £3,000 in any single tax year, has already gone up; basic rate taxpayers now pay 18 per cent, an increase from 10 per cent previously, while higher rate taxpayers pay 24 per cent, up from 20 per cent.

The rules on inheritance tax are also changing. Most significantly, from April 2027, money left in your pension when you die will begin counting as part of your estate for inheritance tax purposes; that means your heirs may have to pay duty on the money, with inheritance tax due on estates worth more than £325,000.

Controversially, the generosity of special exemptions for business owners – including farmers – have been reduced. Still, financial advisers can help you to

navigate these reforms – mitigating some of the additional taxes you and your family might now face, and adjusting your plans where necessary. “So much has changed and there will be more to come,” says Ola Abdul, CEO of Fundment, which provides technology to help financial advisers serve their clients. “Advisers need to make sure they have the right tools to work with clients effectively, and many now see themselves as financial doctors – providing ongoing financial care as it is needed.”

For example, advisers will steer you towards tax-efficient savings structures. First, everyone has an individual savings account (Isa) entitlement; you can invest up to £20,000 a year into an Isa, and all income and

“*Many advisers now see themselves as financial doctors, providing their clients with ongoing financial care as it is needed*”

gains – of whatever size – will be tax-free. That’s even more valuable with capital gains tax going up.

Similarly, contributions to private pensions – both workplace and individual plans – are tax-efficient. You get tax relief on these payments – free cash from the government – and all your savings grow free of tax, just like in an Isa. Other options include the enterprise investment scheme and venture capital trusts; both offer a range of tax breaks, but require you to invest in smaller, riskier businesses.

Advisers will also ensure you’re making the most of various allowances. You can earn up to £500 in dividend income each year with no tax to pay; that can be useful if you have investments, but also if you run your own business and pay yourself this way. You also get £3,000 worth of capital gains tax free each year; an adviser may suggest you take some profits from your investments to make the best use of this allowance.

On inheritance tax, there are opportunities to plan ahead. Couples get their own inheritance tax allowances and can pass these on to each other, increasing the value of their tax-free estates to £650,000. Special rules applying to your home can increase this to £1 million. You can also reduce the value of your estate by giving some of it away during your lifetime; an adviser might suggest taking out life insurance to cover the bill.

“The extension of inheritance tax to pensions should also give pause for thought,” adds Stevens. “Currently, it makes sense to draw on other savings

“*The extension of inheritance tax to pensions should also give pause for thought. Currently, any unused pension cash can be passed on free of tax; in future, some families may want to rethink that approach.*”

first when you reach retirement, because any unused pension cash can be passed on free of tax; in future, some families may want to rethink that approach.”

The more complex or specialist your finances, the more it makes sense to seek expert advice. Small business owners will certainly want to discuss their situation with an adviser, as the new capital gains tax rates could significantly increase the tax bill when they sell up and the inheritance tax reforms are also a concern. Farmers need help too.

Advice needn’t be face to face – many advisers are investing in technological solutions that enable clients to get help remotely through multiple channels. That may be more convenient – and give you access to help straight away as the government continues to make further changes. “You can now get real-time data or use super apps to keep a constant watch on your portfolio,” says Abdul. “As the environment becomes more complex and changeable, that can help you to keep up.”

Budget blitz: the rules around inheritance tax are changing



THE GUIDE’S MISSION

It’s a frustrating imbalance. Millions of Brits who could benefit from financial advice don’t access it. Yet, almost all of those who do access financial advice find it valuable: our data shows that 98% would recommend their adviser.

The 2025 Top Rated Financial Adviser Guide sets out to demystify the advice landscape and points to the advisers (and financial coaches) who do brilliant work for their clients. As decided by...their clients.

In total, 2,633 advisers and coaches from 1,352 different firms are included in the 2025 Guide. They collected 61,686 reviews last year with an average rating of 4.89 out of 5.

Each adviser has been endorsed by at least 10 clients, and is a fully verified member of VouchedFor - so we’ve checked that they have the necessary permissions to practice.

We also check advisers’ identity, qualifications and client reviews, and we monitor the outcomes for everyone who contacts an adviser through VouchedFor.

At the end of the Guide you will find a Top Rated Firm section, celebrating firms who regularly monitor feedback from all their clients, and perform well against industry benchmarks.

All we do at VouchedFor is driven by the mission to help people access the best advice for them. The 2025 Guide is an important part of our efforts, and I sincerely hope you find it valuable.



Hattie Spurrell

HATTIE SPURRELL
DIRECTOR OF ADVISER
SUCCESS, VOUCHEDFOR

*The Advice Gap, May 2023, The Lang Cat

HOW TO USE THE GUIDE

Advisers in this Guide are members of VouchedFor, which involves a low monthly cost so we can verify their client feedback and qualifications. Here are 6 top tips to help choose which adviser is best for you.

1 UNDERSTAND DIFFERENT ADVISER TYPES

Each Top Rated Adviser’s services can be found on their VouchedFor profile.

2 ASK HOW MANY CLIENTS THE ADVISER HAS

It’s helpful to know what percentage of an adviser’s clients have left them reviews.

3 READ REVIEWS LEFT BY PEOPLE LIKE YOU

Filter an adviser’s reviews based on criteria that match your needs.

Still struggling? We’d love to help – please contact us on customer_service@vouchedfor.co.uk or call 0203 111 0580

4 LOOK FOR RECENT REVIEWS

These are a stronger indicator of current service levels than older reviews.

5 CHECK HOW MANY YEARS THE ADVISER HAS BEEN TOP RATED (THE MAX. IS 7)

This shows an adviser has invited regular feedback for a long time.

6 LOOK AT THE ADVISER’S QUALIFICATIONS

Some advisers have advanced qualifications which we don’t have space to list here; you can find them on their VouchedFor profile.

THE PSYCHOLOGY OF LOSS AND GAIN

Money matters can, understandably, go hand in hand with emotions – but emotions can also lead to mistakes.

The lottery effect, as behavioural psychologists call it, can tempt people to chase “hot” stocks or funds, even though they’re not suitable for their financial objectives or carry more risk than is appropriate.

Fear of missing out can make investors become fixated on the money they could have made from an investment, leading them to abandon sensible financial planning.

People’s reactions to losses are particularly powerful. One study found that losing £100 can feel twice as painful as the positivity felt from gaining £100. As a result, investors are often tempted to sell out of loss-making investments – for fear of their losses getting worse – even though this means missing out

on a recovery and potential medium and long-term gains.

Being aware of these emotional biases can help you to remain disciplined. A good financial adviser will also help support you through your natural emotional responses.

The key is to have a plan and then to stay focused on your long-term goals rather than getting hung up on short-term changes.

“Planning investments with specific goals helps investors select the right products and stay motivated,” says BlackRock’s Heather Christie.

“Goals-based investing aligns investments with your timeline and risk tolerance, leading to smarter decisions on products and easier progress tracking.”

“*Fear of missing out can make investors fixate on the money they could have made from an investment, leading them to abandon sensible financial planning.*”

VOUCHEDFOR'S TOP RATED FINANCIAL ADVISERS

CENTRAL ENGLAND

NAME	FIRM	REVIEWS	LOCATION	YEARS QUALIFIED
Chris Guttridge	True Potential	304	B1	6
Thomas Dickson	Wealthwide*	268	B1	7+
Laura Salter	Forvis Mazars*	132	B1	5
Gem Durham	Whitebeam Independent Financial Advice	120	B1	7+
Rudy Smith	Ascot Lloyd*	102	B1	2
Kira Sehmbi	True Potential	97	B1	7+
Paul De Vries	Ascot Lloyd*	95	B1	1
Martin Brown	Wealthwide*	82	B1	3
Ranjit Virk	Wealthwide*	77	B1	2
Daniella Campbell	Forvis Mazars*	38	B1	1
Daniel Cornish	Wealthwide*	35	B1	1
Andy McGowan	Charles Stanley*	40	B15	1
Peter Aylward	Charles Stanley*	32	B15	1
Nick Shioleftou	NPS Wealth Management	56	B17	1
Simon Foley	Charles Stanley*	30	B17	1
Paul Tracey	Provest Wealth Management	26	B45	2
Daniel Sperber	Coleshill Wealth Management	61	B46	3
Jason Harris	88 Capital Wealth Management	65	B49	5
Simon Baldwin	High House Wealth Management*	192	B60	4
Lisa Footes	Footes Financial Planning	157	B60	4
Darren Mason	Ascot Lloyd*	109	B60	2
Stephen Baker	Ascot Lloyd*	106	B60	2
Tom Morgan	Orca Wealth	105	B60	1
Daisy Whateley	Whateley Wealth Management	86	B60	2
Nicola Whateley	Whateley Wealth Management	45	B60	1
Mandy Lewis-Brammer	AFH Wealth Management	35	B60	1
Gunveer Atwal	Whateley Wealth Management	25	B60	1
Kevin Tse	AFH Wealth Management	13	B60	1
Martin Brennan	Ethical Adviser	113	B72	6
Amanda Reid	Gemini Wealth Management	233	B73	7+
Simon Stanley	AFH Wealth Management	12	B73	1
Ross Foxall	Warwick Wealth Management	61	B74	2
Ian Laker	Bosworth Wealth Management	123	B77	3
Alex Richardson	S1 Bettridge Financial Planning	55	B80	4
Colin Hart	True Potential	110	B90	1
Derek Mills	Derek Mills Wealth Consultancy	38	B90	1
Steven Rowe	Lucent Financial Planning	256	B91	7+
Paul Glover	Ernest Grant*	123	B91	1
Natalia Lingham	Sandringham Financial Partners*	112	B91	2
Luke James	Lucent Financial Planning	95	B91	3
James Richards	Ernest Grant*	86	B91	6
Liam O'Neill	O'Neill and Co. Wealth Management	43	B91	1
Paul Rihal	Paul Rihal	43	B91	2
Keely Woods	Lucent Financial Planning	20	B91	1
Matthew Warren	Warren Wealth	16	B91	1
Jon Andrews	True Potential	14	B91	1
Spencer Kite	Ernest Grant*	14	B91	1
Darren Houlcroft	Houlcroft Wealth Management	83	B97	4
Claire Watson	Quilter Financial Advisers	17	BS29	1
Benjamin Clay	Clay Wealth Management	119	CV1	4
Craig Bonsor	Jalapeno	82	CV1	5
Adrian Middup	Jalapeno	78	CV1	5
Harry Pratt	Radiant Financial Planning	24	CV1	1
Stephanie McMahon	AFH Wealth Management	19	CV1	1
Simon Millward	Millward Wealth Management	147	CV21	6
Akhil Satsangi	PKS Associates	131	CV21	6
Alex Bolton	Azets Wealth Management*	17	CV3	1
Lisa Millward	Millward Wealth Management	269	CV31	7+
James Marston	Quilter Financial Advisers	96	CV31	2

Ravinder Ghuman	Beaufort Wealth Management	73	CV31	1
Craig Saxton	Saxton Financial Planning	49	CV31	4
Nick James	NewRoad Financial Planning	44	CV34	4
Frazer Laird	Beaufort Wealth Management	30	CV34	1
Tony Ross	Velocity Financial Planning	23	CV34	2
Anthony Ward	Blackstone Financial Management	57	CV35	2
Helena Lindley	Brace Financial Wellbeing*	51	CV35	4
Dawn Elkington	Ellis Bates (part of Shackleton)*	95	CV47	3
Paul Grice	Rothesay Bennett Financial Planning	221	CV8	5
Lee Gardner	Gardner Financial Management	166	CV8	7+
Alan Crowley	Financial Design	153	CV8	7+
Charles Westrope	Bridgegate Wealth Management	45	CV8	2
Robert Boland	Cotswold IFS	64	CV9	1
Matthew Naylor	White Stone Financial Planning	32	CV9	2
James Pillingier	Profusion Wealth Management	147	DE1	7+
Stuart Orridge	The Premier Partnership	117	DE1	1
Paul Harman	Profusion Wealth Management	109	DE1	7+
Jo Highton	Hoyl Independent Advisers	56	DE1	2
Rachael Graham	Blossom Financial Planning	51	DE1	1
Ben Woodbridge-Stocks	Stocks & Co Financial Planning	32	DE1	1
John Tucker	Chrysalis Wealth Management	18	DE1	1
Mark Johnson	Integritas Financial Planners	175	DE11	7+
Chris Parker	Argentis	75	DE11	2
Nicholas Oliver	AFH Wealth Management	54	DE11	4
Adam Alden	Integritas Financial Planners	45	DE11	3
Stephen Jones	Clear Solutions	62	DE14	1
Holly Snooks Harrold	AFH Wealth Management	27	DE14	2
Mark Rodgers	Ascot Lloyd*	103	DE4	2
Andrew Whitehead	Honeycroft Wealth Management	64	DE55	4
Surdeep Lall	Rhodes Wealth Management	33	DE6	2
Brian Flindall	Credencis*	270	DE7	5
Sonia Marriott	Sovereign Wealth	83	DE7	4
Adam Rendall	Consequential Planning	62	DY12	4
Jon Darley	Consequential Planning	53	DY12	2
Caroline Laudren	Consequential Planning	38	DY12	1
Michael Farrance	Consequential Planning	21	DY12	4
Simon Davies	Beals Mortgage and Financial Services	326	DY13	4
Nicholas Lue	JPA Financial Services	127	DY6	4
Scott Saxby	JPA Financial Services	107	DY6	3
Jack Noott	Meriden Financial Planning*	233	DY8	4
Kirsty Tyler	Wyfield Wealth Management	146	HR1	4
Goss Lumsden	Prosser Knowles Associates	79	HR1	2
Mark Young	Padstone Financial Management	20	HR1	1
Tristan Renfree	Charterhouse Portfolio Management	92	HR9	1
Scott Gallacher	Rowley Turton*	415	LE1	7+
Gary Metcalf	Gemini Wealth Management	238	LE1	7+
Alan Turton	Rowley Turton*	123	LE1	5
Bharat Chudasama	Tudor Franklin	89	LE1	7+
Nilesh Patel	Positive Solutions	80	LE1	5
Matthew Pearson	Cobens Wealth Management	75	LE1	2
Adam Geddes	Paul Geddes Wealth Management	71	LE1	4
Nathan Smith	Mattioli Woods	46	LE1	2
Aimee Hogg	Furnley House	28	LE1	1
Sharad Champaneria	Accomplished Financial Solutions	25	LE1	1
Matt O'Hara	Mattioli Woods	20	LE1	2
Keeley Upton	O'Connor Wealth Management	14	LE1	1
Clare Farrell	True Potential	64	LE10	1
Mark Farrell	True Potential	53	LE10	2
Robert Lallo	Sandringham Financial Partners*	121	LE11	6
Ben Woolley	True Potential	26	LE11	2
Liz Tuccy	Elizabeth Tuccy	145	LE12	3
Colin Johnson	Artemis Financial Planning	38	LE12	1
Stephen Hunt	Raven Wealth	117	LE15	7+

Jo Calver	Calver Wealth Management	70	LE15	4
Tobias Colton	Tobias Colton Wealth Management	20	LE15	1
Abigail Brown	Oak Wealth Planning	77	LE16	7+
Andrew Highfield	Fortura Financial Partners	76	LE16	2
Paul Eason	RMI Independent Financial Advisers	71	LE16	5
James Slowey	Gransha Financial Services	229	LE17	7+
Evan Roberts	Roberts Wealth Management	52	LE18	4
Sarah Astley	Mattioli Woods	31	LE18	2
Alexander Thomas	GP3 Financial Solutions	30	LE18	2
Glen Coleman	PSA (Financial Services)	21	LE18	1
Martin Stanley	Rowley Turton*	91	LE19	4
Kris Amliwala	Designer Wealth Management	62	LE2	4
Marcus Flint	AGW Financial Planning	20	LE2	1
Sophie Wreford	Willday Wealth Management	11	LE3	1
Richard Meats	Tudor Franklin	90	LE6	3
Hannah Cowell	Zplan Wealth Management	290	LE65	7+
Chris White	Cobens Wealth Management	168	LE65	1
Shane Fox	Principle Financial Services	193	LE67	5
Alastair May	Alastair May Financial Planning	32	LE67	1
Stephanie Smith	Stephanie Smith Financial Planning	32	LE7	1
James Espin	IQ Financial Advice	124	LN1	1
Kyle Penn	Harvest Associates	118	LN1	2
Tom Olsak	Forrester Boyd Wealth Management*	68	LN1	3
Matthew Sargeant	Tower House Wealth Management	51	LN1	1
Alexander Munn	Forrester Boyd Wealth Management*	114	LN11	3
Gavin Smart	Forrester Boyd Wealth Management*	91	LN11	3
Alan Curtis	True Potential	80	LN11	7+
Paul Boutle	RetireInvest	103	LN4	5
Claire Markham	F.H. Manning Financial Services	201	LN9	6
Cole Mills	F.H. Manning Financial Services	28	LN9	2
Tracy Yeomans	Ryley Wealth Management*	190	NG1	4
Will Diggins	Ryley Wealth Management*	141	NG1	4
Rebecca Aldridge	Balance: Wealth Planning	136	NG1	3
Paul Waites	Ryley Wealth Management*	114	NG1	4
Peter Frogson	One Four Nine Wealth*	110	NG1	1
Roger Milner	BlakeBrooke Financial Advice	76	NG1	4
David Ryley	Ryley Wealth Management*	73	NG1	4
Mark Pennington	Ryley Wealth Management*	68	NG1	3
Peter Haigh	One Four Nine Wealth*	57	NG1	1
Chris Hanbury	Hanbury Financial Planning	56	NG1	4
Gavin Lawler	Rhodes Wealth Management	50	NG1	4
Gabriella Witek-Morgan	Ryley Wealth Management*	45	NG1	2
Sally Jackson	One Four Nine Wealth*	39	NG1	1
Liam Bray	One Four Nine Wealth*	32	NG1	1
Leckie Presley	Kin Lifetime Planning	19	NG1	1
Ryan Haynes	Ryley Wealth Management*	18	NG1	1
Hina Desai	Forvis Mazars*	17	NG1	1
David Murden	Sense Financial Solutions	227	NG13	5
Natalie Norman	BlakeBrooke Financial Advice	44	NG16	2
Maria Danielle Slack	M D Slack Wealth Management	93	NG18	3
Martin Grundy	Fidelius*	65	NG18	2
Ian Kells	Stepping Stones Financial Planning	45	NG18	3
Matt Pike	Opal Financial Planning	39	NG18	2
Andrew Surtees	Park Hall Financial Services	23	NG18	1
Phillipa Bown	Park Hall Financial Services	32	NG19	1
Neil Gilbourne	3R Financial Services	317	NG24	7+
Jacob Wright	Fintuity	45	NG24	1
Jacob Manderfield	Kellyhill Financial Planning	19	NG24	1
Lucy Guinness	Castlegate Financial Management	17	NG24	1
Becky Womble	Castlegate Financial Management	46	NG31	4
John Crichton	Grange Estates Wealth Management	268	NG9	7+
Keith Brace	Brace Financial Wellbeing*	192	NN1	4
Joe Davison	Maitland James Financial Planning*	176	NN1	4

Marc Dicks-Jones	Insight Wealth Financial Advisers*	141	NN1	3
Jason McConkey	Insight Wealth Financial Advisers*	117	NN1	3
Lijo George	Sterling Street	111	NN1	5
Daniel Payne	Golden Oak Wealth Management	100	NN1	6
Matthew Harrison	Tower House Wealth Management	37	NN10	3
Dhruv Vyas	Serenity Wealth Management	28	NN11	1
Paul Anstee	Fountain Wealth Management	191	NN14	4
Conor O'Sullivan	O'Sullivan Financial Planning	56	NN15	2
Baljinder Mann	True Potential	30	NN15	2
John Stimpson	Perspective	13	NN17	1
Ray Coker	Attain Financial Planning	69	NN8	6
Richard Jones	Accession	82	PE8	1
Emma Wilcock	Accession	24	PE8	1
Joe Morica	Accession	16	PE8	1
Ash Desai	IronMarket Wealth*	272	ST1	4
Wes Wilkes	IronMarket Wealth*	70	ST1	2
Nathan Waldron	Evergreen Financial Planning	64	ST1	3
Nicola Conway	St. James's Place	59	ST1	1
David Dean	Zplan Wealth Management	33	ST1	1
Neil Dawson	True Potential	30	ST1	2
Lukasz Tomczyk	Reffiness	25	ST1	1
Daniel Hyde	Daniel Hyde Financial Services*	104	ST13	1
Simon Francis	RBA Wealth Management	31	ST14	2
Richard Hollington	Fairstone	206	ST15	7+
Steven Hendry	Stonegate Wealth Management*	201	ST15	7+
Olivia Williams	Stonegate Wealth Management*	39	ST15	3
James Morris	Paton-Feaver Chartered Financial Planners	17	ST16	1
Mark Evans	Beaumont Wealth	92	SY1	2
Paul Carpenter	Beaumont Wealth	74	SY1	1
Rhys Chaloner	HCI Chartered Financial Planners*	88	SY11	1
Alasdair Coutts-Britton	Better World Financial Planning	26	SY11	2
Olivia Lowe	Perspective	20	SY11	1
Joe Allen	Hoyl Independent Advisers	55	SY3	5
Ollie Hill	Quilter Financial Advisers	49	SY3	1
Lee Taylor	Robert Nicholas Financial Advisers	76	TF1	4
Rikesh Bhatt	8 Financial Planning	65	TF1	1
Chris Hough	Hough Financial	19	TF1	1
Claire Dentith	C D Financial	39	TF11	2
Leanne Tolley	C D Financial	37	TF11	2
Lionel Paton-Feaver	Paton-Feaver Chartered Financial Planners	13	TF11	1
Kyron Morgan	Paton-Feaver Chartered Financial Planners	10	TF11	1
Laurence Bilboe	Paton-Feaver Chartered Financial Planners	10	TF11	1
Jessica Shukie	Croft & Oakes	59	TF3	3
Matthew Williams	Ascot Lloyd*	227	WR1	5
Steve Perera	Britannic Place Financial Management*	186	WR1	4
Steve Maybury	Steve Maybury Financial Planning	113	WR1	1
David Huntbatch	Kind Wealth	61	WR1	1
Andrew Rankin	Westminster Wealth Management*	17	WR1	1
Karl Thorpe	AFH Wealth Management	54	WR11	1
Paul Urmoston	Fresh Approach Financial Planning*	208	WR14	6
Eugenie Cameron	Malvern Financial Planning	83	WR14	2
Lavinia Macdonald	The Money Clinic	12	WR14	1
Jane Newman	Jane Newman Financial Planning	249	WR9	7+
Emily Newman	Jane Newman Financial Planning	128	WR9	5
Dale Gough	Prosser Knowles Associates	94	WR9	4
Rachel Robb	Prosser Knowles Associates	64	WR9	4
Sophie Wilkins	Bow Wood Financial Planning	58	WR9	3
Leighton Parkes	Prosser Knowles Associates	42	WR9	1
Martyn Davies	Mindful Financial Planning	38	WR9	2
Nick Broughton	Prosser Knowles Associates	34	WR9	1
David Grigg	Hampton James Financial Associates	30	WR9	1
Thomas Caldwell	Form Financial Clarity	19	WR9	1
Kristian Vind	Chapter House Wealth Management	135	WS13	5

VOUCHEDFOR'S TOP RATED FINANCIAL ADVISERS

Rory Menmuir	Charles Stanley*	53	WS13	1
Gregory Palethorpe	Bowbrook Financial Planners	35	WS13	1
Gary Singh	Sigma Wealth Partners	112	WV1	5
Jason Barefoot	Ascot Lloyd*	109	WV1	2
Sam Brueton	Bank House Financial Planning	86	WV1	3
Mark Davies	Charles Stanley*	85	WV1	1
Cameron Fox	Bank House Financial Planning	64	WV1	3
Lee Waterfall	Purity Financial Services	59	WV1	3
Chris Bucknall	Quilter Financial Advisers	40	WV1	1
Caroline Castle	Ascot Lloyd*	22	WV1	1
Hannah Garratt	Bank House Financial Planning	16	WV1	1
Tony Thursfield	Thursfield & Co	42	WV13	2

EAST ENGLAND

Henry Metcalf	Golden Oak Wealth Management	92	CB1	7+
David Philpott	DP Financial Solutions	71	CB1	1
Nick Farnden	Fidelius*	70	CB1	2
Rebecca Lucas	Liora Wealth	13	CB1	1
John Stirling	Walden Capital*	141	CB10	3
Mikki Gant	Walden Capital*	107	CB10	2
Daniel Turner	Greenways Financial Planning	66	CB10	1
Andrew Lee	Walden Capital*	54	CB10	2
Jeremy Farrant	JF Wealth Management	22	CB23	1
Lee Andersen	Kellyhill Financial Planning	53	CB9	1
Charles Bailey	McMillan Wealth Consultants	60	CM0	5
James Caviel	Hoyl Independent Advisers	216	CM1	1
Chris Clark	Advance Wealth	191	CM1	2
Colin Fletcher	Fidelius*	110	CM1	2
Carlton Hall	Fidelius*	97	CM1	2
Gavin Johnson	Solus Financial Planning	73	CM1	3
Chris Leyden	Copnol Consultancy	55	CM1	5
Paul McCaffrey	Advance Wealth	48	CM1	2
James Taylor	Taylor Financial Management	47	CM1	3
Mark Coomber	Canonium Wealth Planning	25	CM1	2
Miriam Lucia Murphy	Miriam Murphy Wealth Management	14	CM1	1
Paul Davis	Clear Financial Advice	256	CM11	7+
Howard Bullock	Clear Financial Advice	100	CM11	4
David Robertson	Amber River East Anglia	52	CM11	1
Luke Adlum	Attivo	28	CM11	2
Matthew Cornall	360 Financial Services	27	CM11	1
Andrew Skinner	Andrew Skinner Wealth Management	80	CM12	4
Jakob Payne	Crocus Wealth	17	CM12	1
Gordon Kearney	Fiducia Wealth Management*	106	CM14	3
Garry Johnson	Garry Johnson Wealth Management	105	CM14	5
Dan Constable	Broom Consultants	74	CM14	1
Steve Green	Steven Green Financial Planning*	113	CM15	6
Sandy Pabial	Continuum	42	CM16	1
Hugo Sparks	Clarence Place Wealth Management	95	CM21	5
Colin Hussey	Garden Wall	64	CM21	4
Tammy Salmon	Salmon Financial Planning	76	CM23	4
Sheetal Jain	Advance Wealth	35	CM23	3
Sonia Charles	Charles Wealth Management	63	CM24	5
Steph McDonald	HarperLees Financial Planning*	96	CM4	4
Mark MacLean	HarperLees Financial Planning*	93	CM4	4
Trey Vella	HarperLees Financial Planning*	54	CM4	3
Peter Beck	Ascot Lloyd*	103	CM7	2
Dylan Ellis	Compass Financial Solutions	65	CM7	2
Stacey Sall	Oakfield Financial Services	21	CM7	1
Penny Speller	Ascot Lloyd*	70	CM77	1
Simon Gibbs	AFH Wealth Management	50	CM8	4
Chris Long	Continuum	30	CM8	1
Casey Mills	TFP Financial Planning*	140	CM9	2
Dan Haylett	TFP Financial Planning*	49	CM9	2

VOUCHEDFOR'S TOP RATED FINANCIAL ADVISERS

EAST ENGLAND

NAME	FIRM	REVIEWS	LOCATION	YEARS QUALIFIED
Dan Seal	AFH Wealth Management	70	PE1	5
Jamie Gordon	Lynas Vokes Investments	106	PE11	2
Graham Bowater	B2 Wealth	12	PE11	1
Richard Townsend	Townsend Wealth Management	56	PE13	1
Paul Gray	Hathaway Gray	66	PE19	1
David Lawrance	David Lawrance Financial Planning	44	PE19	2
Alison Bayly	Chromatic Wealth Management	38	PE19	2
Tim Webb	Westminster Wealth Management*	37	PE29	1
Sophie Harrison	Hamilton Bennett Financial Solutions	24	PE29	2
Simon Mead	Ascot Lloyd*	147	PE30	1
George Rawlings	Ascot Lloyd*	112	PE30	2
Paul Stone	Ascot Lloyd*	88	PE30	2
Katie Hately	GPFM*	60	PE30	2
Michael Crisp	Fairstone	58	PE30	1
Georgina Wilkinson	Sovereign Wealth	19	PE30	1
James Anderson	Westminster Wealth Management*	94	PE9	2
Stephen Dean	CMIS IFA	44	PE9	4

GREATER LONDON

Naomi Haynes	Naomi Haynes Financial Planning	77	AL9	4
Graeme Mackay	Foxgrove Associates	152	BR1	7+
Rakhee Wood	Butterfly Financial Planning	92	BR1	3
James Stilwell	Wade Wealth Partners	73	BR1	4
Lawrence Gold	Gold Wealth Management	63	BR3	5
Matthew Clements	Clarence Place Wealth Management	35	BR3	2
Takunda Sando	Quilter Financial Advisers	96	BR4	5
Fotis Ioannou	Sentient Wealth Management	139	BR7	7+
Richard Cotton	Isio Wealth Planning*	72	CR0	1
Richard Howard	RMH Financial Planning	49	CR0	1
Robert Hird	Isio Wealth Planning*	36	CR0	1
David Sheehan	True Potential	37	CR3	1
Adam Liddelow	Hoxton Wealth	73	CR6	2
Ken Kennison	Quilter Financial Advisers	36	CR6	1
Christian Selley	CJ Selley Financial Planning	19	CR6	1
Paul Standerwick	MLP Wealth Management*	162	CR8	1
Brian Downton	Downton and Ali Associates	111	DA1	5
Jack Barratt	The Private Office*	20	DA14	1
Edward Richardson	Quilter Financial Advisers	87	DA3	2
Chia Shamsaddini	Clarence Place Wealth Management	85	DA3	5
Christopher Wotton	Wotton Wealth Management	105	DA5	7+
Liam Brencher	Lawton Financial Services	104	DA5	4
Max Horry	Lawton Financial Services	95	DA5	4
Michael Margai	Perfect Protect	145	DA9	1
Mojeed Odugbayi	Eminent Financial	194	E14	4
Benny Liu	Riverside Financial Consultants	85	E14	1
Richard Veal	Pinnacle Wealth Management	24	E14	1
Eloise Cornes	OneWealth	23	E14	1
Luke Baggs	OneWealth	14	E14	1
Sam Curtis	The Private Office*	25	E15	1
Ryan Nobbs	Evergreen Financial Planning	58	E18	3
Nighat Ali	Solasta Wealth Management	48	E18	2
Sam Price	Kensho Financial Planning	11	E3	1
Ian Penberthy	DGS Chartered Financial Planners	46	E4	3
Eric Cheung	EFC Financial Planning	47	E9	4
Owrang Rahmani	Credius Wealth	206	EC1A	5
Oliver Pereira	Clearwater Wealth Management	54	EC1A	4
Mark Dodd	Holden & Partners*	71	EC1R	1
Reece Biggadike	Holden & Partners*	45	EC1R	1
Tim Cosway	Holden & Partners*	38	EC1R	1

Stefani Williams	Holden & Partners*	30	EC1R	1
Andrew Johnston	Holden & Partners*	29	EC1R	1
Steve Pyne	Holden & Partners*	25	EC1R	1
Sebastian Gladwish	HFMC Wealth	14	EC1R	1
Bruce Davies	Holden & Partners*	13	EC1R	1
Sam Whybrow	Thanks Wealth Planning*	210	EC2A	7+
Sundeeep Hothii	Burlington Associates	15	EC2A	1
Andrew Peters	Black Swan Financial Planning	132	EC2M	2
Rob Young	Black Swan Financial Planning	101	EC2M	5
Peter Ditchburn	Deep Dive Financial Planning*	82	EC2M	6
Guy Skinner	Citygate Financial Planning*	46	EC2R	2
Ross Speedie	InterestMe Financial Planning	192	EC3A	7+
Jonathan Kinch	Fairstone	167	EC3N	7+
Adam Rideout	Foster Denovo	94	EC3N	7+
Steven Jerath	SRJ Wealth Management	85	EC3N	5
Jordan Marshall	Jordan Marshall Wealth Management	76	EC3N	5
Edmund Wilson	The Edmund Wilson Practice	61	EC3N	5
Marlene Francisco	St. James's Place	46	EC3N	4
James Parfitt	Castell Wealth Management	37	EC3N	3
Thomas Miller	Charles Stanley*	33	EC3N	1
Alex Phillips	William Street Wealth Management	32	EC3N	3
Jonathan Attenborough	Waymark Financial*	211	EC3V	5
Ivan Ivanov	MKC Wealth	137	EC3V	2
Daniel Mole	InterestMe Financial Planning	127	EC3V	2
Bobby Phillips	Virtus Financial Planning	120	EC3V	2
Daniel Freeman	Freedom Wealth Management	101	EC3V	3
Nick Dunne	Dunne Wealth Management	101	EC3V	4
Matt Holbrook	MKC Wealth	98	EC3V	2
Sarah Priestley	InterestMe Financial Planning	98	EC3V	1
Robert Gurney	MKC Wealth	93	EC3V	2
Nick Cummins	Nick Cummins Wealth Management	92	EC3V	5
Andrew Rumbles	Prospera Wealth Management	91	EC3V	2
Simon Farrar	Virtus Financial Planning	89	EC3V	3
Warren Fairchild	Argentis	85	EC3V	2
Ninder Dhillon	Ninder Dhillon	80	EC3V	3
Dean Foley	Fidelius*	75	EC3V	2
Charlotte Whiteley	Affirma Financial Planning	72	EC3V	1
Kevin Keeney	MKC Wealth	68	EC3V	2
Anne McClean	IPS Capital	64	EC3V	2
Abolore Awesu	Quilter Financial Advisers	62	EC3V	3
Gerard Barrientos	InterestMe Financial Planning	62	EC3V	1
Sean Wilkinson	Reliance Wealth Management	62	EC3V	5
Akash Angrish	Fortura Financial Partners	60	EC3V	4
Matthew Dickinson	MKC Wealth	54	EC3V	1
Alex Pickersgill	AP Partners Wealth Management	53	EC3V	1
Ben Hayward	Acacia Wealth	48	EC3V	4
Tom Norton	AAG Wealth Management	47	EC3V	2
Tudor Stainsby	The Penny Group	44	EC3V	1
Kiran Sidhu	The Penny Group	42	EC3V	1
Ian Craigie	AAG Wealth Management	39	EC3V	2
Dwayne Martin	Aegis Financial Planning	38	EC3V	1
Luke Carless	VIVA Wealth	35	EC3V	3
Tarun Kundi	Vantage Wealth Management	35	EC3V	1
Hiren Nandha	Hiren Nandha	31	EC3V	2
Joshua Sparkes	Clearwater Wealth Management	30	EC3V	3
Rutshit Tuduwage	Foster Denovo	29	EC3V	1
Joshua Cook	Foster Denovo	28	EC3V	2
Jonathan Elliott	Jonathan Elliott Wealth Management	27	EC3V	1
Arthur Hill	Citygate Financial Planning*	26	EC3V	2
Grace Agnew	Foster Denovo	21	EC3V	1
Mike Edworthy	Freedom Wealth Management	21	EC3V	2
Thomas Henri	Nest Finance London	18	EC3V	1
Samuel Baptiste	Belmont Wealth Management	16	EC3V	1

Joe Hasberry	StoneArch Advisers	13	EC3V	1
Jonny Payne	Clearwater Wealth Management	13	EC3V	1
Ryan Cumming	St. James's Place	13	EC3V	1
Owen Cook	Ablestoke Wealth Management	176	EC4A	1
Paul Simmons	Forvis Mazars*	148	EC4A	5
Kevin Hughes	Westminster Wealth Management*	118	EC4A	3
Abby Ivson	The Private Office*	80	EC4A	3
Chris Merry	The Private Office*	69	EC4A	2
Jennifer Massey	Forvis Mazars*	59	EC4A	3
Tom Mills	Forvis Mazars*	49	EC4A	2
Banty Bhojraj	Westminster Wealth Management*	48	EC4A	1
Rohan Sandhu	The Private Office*	45	EC4A	2
Scott Kennedy	Westminster Wealth Management*	39	EC4A	2
Jason Witcombe	Empower Partners	36	EC4A	1
Freddie Fitton	The Private Office*	26	EC4A	1
Antony Williams	Empower Partners	25	EC4A	1
James Robinson	Forvis Mazars*	92	EC4M	2
Rebecca Harbrow	Blue Heron Financial Services	65	EC4N	2
Asif Hussain	Asset Wealth Advisory	109	EC4V	5
Malcolm O'Donovan	Think Financial Wealth Management	117	EN11	4
Vanessa Deen	Deen Financial Services	75	EN11	5
Katie Campbell	Autonomy Finance	47	EN11	2
Filip Slipaczek	Slipaczek Chartered Financial Planners	362	EN5	7+
Glen Howe	Howe Financial Advisers	58	EN5	1
Yasemin Kussan	Maria Zecca Financial Planning	11	EN6	1
Alex Kyprianou	The Private Office*	86	EN8	2
Amit Mittal	Expert Independent Financial Planning	182	HA1	7+
Craig Crawford	Crawford Dean Wealth Management	24	HA2	2
Dipen Tanna	Tanna Lifestyle Financial Planning	30	HA3	1
Bejal Shah	London Wealth	102	HA4	7+
Dipesh Shah	Oakdale Financial Services	126	HA5	1
Veronica Mann	Talis Financial Advisers	91	HA5	1
Jatish Pindolia	Lyfe FS	90	HA5	5
Waseem Herwitker	Earlswood Wealth Management	37	HA5	1
Kinnary Sitwala	Talis Financial Advisers	29	HA5	1
Hansa Hirani	Hansa Wealth Management	138	HA7	4
Chate Dosanjh	Arcus Wealth	63	IG1	2
Edward Tudor	The Private Office*	166	IG10	6
Nade Khan	Nade Khan	41	IG2	3
Ollie Wilson	Enver Wealth Management	34	KT1	3
Liam Wright	Twelve Wealth Management	19	KT11	1
Ketan Shah	Argentis	175	KT12	2
Lisa Calvert	Lisa Calvert Financial Wellbeing	47	KT13	1
JP Haywood	Integra	14	KT13	1
Tom Bostock	Intelligent Pensions	39	KT15	1
Paul Keeley	One Financial Solutions*	163	KT17	6
Tom Donlea	Castell Wealth Management	47	KT17	5
Ray Martin	Four Seasons Financial Planning	150	KT19	1
Jim Anderson	Throgmorton Private Capital	59	KT20	2
Tom Grunsell	Westminster Wealth Management*	74	KT21	1
Christopher Rayburn	Quilter Financial Advisers	26	KT21	1
Alison Fry	GPFM*	19	KT22	1
Seán Standerwick	MLP Wealth Management*	163	KT6	7+
Carl Mountain	2plan Wealth Management	162	KT8	5
Jane Hodges	Money Honey Financial Planning	120	N1	7+
Lisa Meller	Personal Finance Movement	33	N1	2
Christy Morrison	Sedulo Wealth*	27	N1	1
Ben Eastlake	Sedulo Wealth*	25	N1	1
Jason Bosworth	Fintuity	17	N1	1
Rabeya Islam	St. James's Place	55	N11	4
Nisheet Shah	Positive Solutions	79	N14	7+
Jasmine Abraham	The Private Office*	46	N14	1
Garrett Stenson	Altair Financial Planning	30	N14	1

VOUCHEDFOR'S TOP RATED FINANCIAL ADVISERS

Sam Sloma	Engage Financial Services	75	N20	2
Pritesh Kabawala	Peak Personal Finance	70	N20	1
Sasan Lohrasb	Frontier Wealth	55	N20	1
Toby Reynolds	Engage Financial Services	30	N20	2
Christopher Toulis	Burlington Wealth Management	11	N21	1
Sonny Joannou	Arcus Wealth	54	N22	3
Jason Wood	The Private Office*	126	N3	5
Bobby Bhuiyan	Estate Lifetime Planning	60	N8	1
Paul Sanders	The Private Office*	181	NW1	7+
Matt Campbell	Stadium Wealth	36	NW1	2
Alun Webster	Audley Wealth	76	NW2	1
Merve Oral	The Private Office*	118	NW3	5
Kanishk Swarup	Compound Wealth Planning	81	NW3	2
Alex Ziff	Alex Ziff Financial Planning	64	NW3	1
Yasuto Arai	Yasuto Arai Wealth Management	45	NW3	4
Nigel Shaffer	Eden Gate Financial Planning	82	NW4	7+
Jon Ramos	J Ramos Wealth Management	52	NW4	4
Marc Harris	Harris Financial Planning	16	NW6	1
Keith Galgut	Wealthwise Financial Solutions	157	NW7	7+
Nila Mistry	Prosperity Life Planning	50	RM1	2
David Bean	Municipal Financial Planning	57	RM11	1
Andy King	Ellis Bates (part of Shackleton)*	129	RM17	3
Tony Martin	True Potential	93	RM4	1
Fiona Morpurgo	Morpurgo Wealth	140	RM5	7+
Andrew Snowball	Geycoat Financial Services	98	SE1	1
Daren Wallbank	Ginkgo Financial*	238	SE10	5
Catriona Bryden	Ginkgo Financial*	31	SE10	1
Peter Clark	Castell Wealth Management	25	SE10	2
Pippa Vick	The Private Office*	31	SE13	1
Steffan Alemanno	The Private Office*	98	SE14	2
Abigail Banks	The Private Office*	138	SE15	5
Elliot Smith	Wealth Spring	25	SE15	1
Dan McGuigan	Vantage Wealth Management	25	SE16	2
Kwasi Asare Obuor-Asimpoh	The Rock - Financial Management Companies	31	SE18	2
Emma Parla	Compass Financial Solutions	10	SE18	1
Sandra Corkhill	SC Financial Planning	85	SE19	7+
Neil Sargeant	Holden & Partners*	44	SE19	1
Sean Irwin	Clarity Wealth Management	106	SE23	2
Alex Shields	The Private Office*	129	SE25	5
Neil Jenkins	Fintegrity IFA*	97	SE3	5
Laura McLean	The Private Office*	63	SE4	4
Martin Card	tba Wealth Management	186	SM1	4
Simon Wade	J G Wealth	74	SM2	5
Christine Tucker	One Financial Solutions*	158	SM5	7+
Neville Shaw	Northcliff Wealth Management	13	SM6	1
Paolo Standerwick	MLP Wealth Management*	300	SM7	5
James Annelly	MLP Wealth Management*	94	SM7	1
Mark Ralph	Financial Framework	37	SM7	1
Andy Springford	Forvis Mazars*	105	SW11	3
Henry Killingbeck	Antler Wealth Management	59	SW12	1
Rebecca Maxwell-Hystop	Rebecca Maxwell-Hystop Financial Planning	36	SW12	1
Richard Martin-Redman	Spiritus Wealth	19	SW13	1
Kirsty Stone	The Private Office*	104	SW14	5
Clare McCarthy	The Private Office*	60	SW15	3
Matthew Lawrence	Chase de Vere	16	SW15	1
Martin Binyon	Green Gate Financial Planning	44	SW16	1
Jonathan Ritterband	The Private Office*	70	SW17	2
David Gladstone	Baker Gladstone & York	13	SW18	1
Martin Rayner	Compton Financial Services	133	SW19	5
Simon Ben-Nathan	Arkenstone Wealth Management	81	SW19	1
Joshua Mathieson	MKC Wealth	52	SW19	1
Adnan Hussain	Attivo	42	SW19	2

Tom Kesterton	Eclipse Financial Planning	74	SW1H	5
Jonathan Hives	First Sentinel Wealth	68	SW1V	3
Toby Band	First Sentinel Wealth	46	SW1V	3
Ben Barratt	First Sentinel Wealth	32	SW1V	3
Ted Wilson	Wilson Wealth Advisory	171	SW1X	6
Sumun Kanda	McMillan Wealth Consultants	74	SW1X	5
John Brewer	Shawfield Wealth Management	55	SW1X	2
Ike Benson	St. James's Place	51	SW1X	1
Laria Collister	Compass Financial Solutions	44	SW1X	2
Toby Thomson	Thomson Private Wealth	24	SW1X	1
Xingang Wang	Wang Wealth Management	23	SW1X	1
Sanjay Wadhia	SWFS	16	SW1X	1
Sebastian Field	Attivo	27	SW1Y	1
Lucie Gee	Westminster Wealth Management*	63	SW20	1
Maria Psarra	Iris Wealth Management	118	SW3	3
Athy Watson	Noula Wealth Consultancy	52	SW3	5
Calam Gallimore	Gallimore Wealth Management	34	SW3	1
Andrew Nicolson	Innovative Wealth Strategies	65	SW6	1
Emily Brear	The Private Office*	46	SW9	2
James Wade	Wade Wealth Partners	141	TW1	2
Tom Fawcett	Globe Independent Financial Advisors	120	TW1	4
Andrew Connolly	Globe Independent Financial Advisors	96	TW1	2
Mark Johnson	MJ Financial Planning	93	TW1	3
John Pickles	Globe Independent Financial Advisors	88	TW1	2
Michael Blosse	Globe Independent Financial Advisors	81	TW1	2
Indy Dhanjal	Fortura Financial Partners	47	TW1	3
Owen Salamao	Belvedere Wealth Management	17	TW1	1
Shammi Sharma	Aspire Mortgages & Financial Services	11	TW1	1
Nikki Zammit	Realise Wealth Management	41	TW16	2
Greg Neall	Wake up your Wealth	84	TW18	5
Richard Sheret	Evolution Financial Services	81	TW18	4
Howard Morgan	Stage Financial	72	TW9	2
Marco Turrent	Journey	49	TW9	4
Martin Crawley-Boevey	PK Group	26	TW9	2
Bradley Carter	Affinity Financial Advisors	46	UB8	1
Ben Clapham	Ellis Bates (part of Shackleton)*	40	W1D	3
Paul Hart	Medical Family Finance*	244	W1G	5
Joseph Awaritefe	Medical Family Finance*	198	W1G	5
Daryl Stafford	Medical Family Finance*	159	W1G	5
Joe Roxborough	Ascot Lloyd*	129	W1G	1
Aaron Banasik	Ascot Lloyd*	91	W1G	1
Mira Scull	Medical Family Finance*	72	W1G	4
Harry Beddoe	Ascot Lloyd*	62	W1G	1
Oliver Prichard	Medical Family Finance*	45	W1G	2
Ben Manso de Zuniga	Medical Family Finance*	27	W1G	2
Katie White	Attivo	91	W1J	2
Philip Dragounis	Kera Wealth Management	62	W1K	3
Blake Reddy	K2 Private Wealth	10	W1X	1
Tim Mottram	Grey Parrot Financial Planning	17	W1T	1
Priory Bazley	Fidelius*	15	W1T	1
Patryk Dyjenski	Clara Wealth Management	72	W4	4
David Gruenstein	The Private Office*	105	W5	5
Martin Wilcocks	Wilcocks & Wilcocks	132	W8	2
Malcolm Snook	MPL Wealth Management	76	WC1R	2
William Busby	MPL Wealth Management	42	WC1R	1
Dominic Clark	Holden & Partners*	19	WC1R	1
Craig Young	Holden & Partners*	15	WC1R	1
Rebecca Cherry	Westminster Wealth Management*	117	WC1V	4
Priyesh Patel	Ablestoke	114	WC1V	7+
Stephanie Jones	Westminster Wealth Management*	103	WC1V	2
Ciaran Rutledge	Ablestoke	48	WC1V	1
Charlotte Evans	David James Wealth*	13	WC1V	1

VOUCHEDFOR'S TOP RATED FINANCIAL ADVISERS

NORTH ENGLAND					
NAME	FIRM	REVIEWS	LOCATION	YEARS QUALIFIED	
Paul Tuson	Ascot Lloyd*	134	BL1	2	
Johnathan Webster	Webster Financial Management	67	BL1	6	
Katia Ghambaryan	Aitana Financial Services	57	BL1	3	
John Lyons	Clear Vision Wealth Management	49	BL1	2	
Lee Jeavons	Cullen Wealth	45	BL1	1	
Jon Livsey	Jones Regan Wealth Management	30	BL1	1	
Ross Taylor	Taylor & Taylor Financial Services	20	BL1	1	
Chris Atherton	Swan Financial Planning	278	BL7	6	
Brett Garlick	Bury Financial Advisers*	432	BL9	2	
Matthew Green	Bury Financial Advisers*	295	BL9	5	
Jeremy Bostock	Holcombe Wealth Management	126	BL9	1	
Emma Connaughton	Holcombe Wealth Management	107	BL9	7+	
David Parkinson	KBA FS*	75	BL9	5	
Sarah Kendell	Financial Options Group	69	BL9	5	
Paul Jones	Mackenzie Financial Planning	58	BL9	1	
Lauren Bailey	Financial Options Group	54	BL9	3	
Carolyn Jeffs	Holcombe Wealth Management	33	BL9	1	
Nazia Haque	Nazia Haque Wealth Management	17	BL9	1	
David Binder	Newcastle Financial Advisers*	141	CA1	5	
Steve Shovlin	Armstrong Watson	119	CA1	6	
Marcus Dodds	Armstrong Watson	67	CA1	2	
Chelsea Whittock	Armstrong Watson	44	CA1	3	
Arran Pamphilon	Zplan Wealth Management	40	CA1	3	
Emma Copley	Armstrong Watson	30	CA1	2	
Scott McNally	Newcastle Financial Advisers*	162	CA11	5	
Justin Rourke	Armstrong Watson	92	CA11	1	
Jonathan Cox	Newcastle Financial Advisers*	55	CA11	2	
Ian Plant	True Potential	75	CA12	2	
Stuart Smith	Armstrong Watson	131	CA13	6	
James Curry	Amber River True Bearing	55	CA13	1	
Adam Tomlinson	Kingfisher House Wealth Management	33	CA13	2	
Michael Piper	Armstrong Watson	14	CA14	1	
Matthew Hignett	Beaumont Wealth	110	CH1	2	
Mark Bird	Chester Financial Wealth Management	108	CH1	4	
Mark Reidford	Innes Reid	90	CH1	7+	
Tom Lenton	Moneytree Wealth Management*	86	CH1	2	
Connor Lovatt	Moneytree Wealth Management*	83	CH1	2	
Mark Fletcher	Moneytree Wealth Management*	77	CH1	1	
Nia Sterio	Beaumont Wealth	77	CH1	2	
Matt Cullen	Gittins & Co. Wealth Management	26	CH1	1	
Matthew Testa	Cullen Wealth	22	CH1	2	
Gerardo Esposito	PPPS Wealth Management	10	CH1	1	
Mark Eldor	Peak Fifteen Financial Planning	81	CH41	2	
Tom Ricketts	Ricketts Financial Planning	44	CH41	1	
Remco Buckley	Ricketts Financial Planning	38	CH41	1	
Gary Davies	Ellis Bates (part of Shackleton)*	152	CH42	3	
Daniel Gilligan	HCI Chartered Financial Planners*	104	CH5	1	
Stephen Cross	True Potential	137	CH60	7+	
William Smith	Wirral Financial Services	125	CH60	2	
Laura Pearson	Storeton Rose Financial Planning	101	CH60	3	
Tim Sands	Quilter Financial Advisers	70	CH60	1	
Richard Jones	Smart Independent Financial Advice	55	CH60	3	
Andrew Birley	Williams Birley Wealth Management	51	CH60	1	
Helen Brown	Phillip Bates & Co Financial Services	170	CH64	2	
Kurtis Done	Reflect Financial	19	CH65	1	
Matthew White	Mat White Financial Services	351	CW1	5	
Lee Spragg	True Potential	47	CW1	1	
Tom Sheldon	Cullen Wealth	27	CW11	2	
Alex Woollam	Quilter Financial Advisers	13	CW12	1	

Rachel Edwards	Thrive Together FP	28	CW2	1
Carol Dickens	New Vision Wealth Strategies	161	CW4	6
Lauren Tudor	Atherton & Associates Wealth Management	62	CW5	3
Jamie Hull	Atherton & Associates Wealth Management	56	CW5	4
Tom Kennedy	Quilter Financial Advisers	54	CW5	2
Richard Astbury	Atherton & Associates Wealth Management	43	CW5	3
Richard Peddie	Atherton & Associates Wealth Management	40	CW5	3
Hannah Needham	KBA FS*	14	CW5	1
Joe O'Connor	True Potential	78	CW6	7+
Ryan Phelps	Hartford Wealth	67	CW8	5
Carla Brown	Oakmere Wealth Management	59	CW8	4
Christopher Jump	Retirement Solutions	47	CW8	1
Helen Nightingale	Resonate Financial Planning	24	CW8	2
Chris Breward	Wealth of Advice	245	DH1	2
Matthew Sinclair	Wealth of Advice	82	DH1	4
Lee Metters	Newcastle Financial Advisers*	68	DH3	3
Anthony Sowerby	Manfield Wealth Management	20	DH4	1
Kate Boon	Lifeplan Financial Management*	194	DH8	7+
Nick Graham-Hall	Newcastle Financial Advisers*	47	DH8	2
Rachel Denham	Denham & Burd Wealth Management*	127	DL1	5
Sara Hollingsworth	Newcastle Financial Advisers*	124	DL1	5
David Corner	Attivo	53	DL1	2
Tristan Burd	Denham & Burd Wealth Management	47	DL1	2
Dan Midgley	Acumen Investment and Pension Solutions	29	DL1	1
Stephen Waite	Attivo	26	DL1	1
Mark Jolley	MN Consultancy	17	DL1	1
Nathan White	St. James's Place	11	DL10	1
Janine Barron	Sandringham Financial Partners*	193	DL12	7+
Barry Talman	MGL Wealth Management	117	DL14	6
Rachael Benford	Newcastle Financial Advisers*	92	DL14	5
Matthew Platt	MLP Financial	84	DL15	5
Derek Dryden	Finli	206	DL6	7+
Kerry Chaloner	Armstrong Watson	56	DL6	6
Tony Clark	Attivo	36	DL8	2
Andrew Woodruff	Woodruff Hill	159	DN1	3
David Yeardley	Discover Financial	88	DN1	4
Steven Bell	True Potential	86	DN1	7+
Maxine Clarke	Flying Colours Advice	73	DN1	5
Sophie Lackie	Pearwood Financial Planning	47	DN1	1
Michael Savage	Casterdon Financial Planning	39	DN1	1
Nick Beedham	Discover Financial	38	DN1	1
Vikram Kasbia	VK Wealth Management	16	DN1	1
Tom Evans	Forrester Boyd Wealth Management*	71	DN15	3
Edward Lane	AFH Wealth Management	59	DN15	2
Dan Seaton	Ryley Wealth Management*	39	DN20	2
Sarah McDonald	Mulberry House Wealth Management	79	DN22	4
Jake Millar	RetireInvest	28	DN22	1
Joe Rogers	Forrester Boyd Wealth Management*	109	DN31	3
Howard Pykett	Forrester Boyd Wealth Management*	89	DN31	3
Chris Gray	Forrester Boyd Wealth Management*	78	DN31	3
Dale Regan	Forrester Boyd Wealth Management*	34	DN31	3
Emma Scrivens	Crosby Financial Planning	20	DN35	1
Laura Duncan	Continuum Financial Services	101	FY5	1
Kristen Cunliffe	Red Star Wealth Management	51	FY8	1
Antony Barton	Robertson Baxter	90	HD1	7+
Stephen Harrison	True Potential	74	HD1	2
Mark Davis	Sandringham Financial Partners*	72	HD1	2
Matthew Bloxsome	Sovereign Wealth	71	HD1	5
Marcus Dunning	Sandringham Financial Partners*	67	HD1	2
William Antill	Dolby Financial Planning	61	HD1	1
Gillian Shirt	Robertson Baxter	46	HD1	4
Dan Willers	Robertson Baxter	40	HD1	2
Alex Howarth	Sandringham Financial Partners*	15	HD1	1
Graham Slater	Eagle Financial Services	252	HD5	5

Darren Pickersgill	Holyokes Group	157	HD6	6
Andrew Young	Becketts F.S.	23	HD7	1
Benjamin Philpott	Philpott Financial	152	HD8	6
Henry Philpott	Philpott Financial	77	HD8	3
Lindsay Carter	Ascot Lloyd*	242	HD9	5
Leanne Harris	Zplan Wealth Management	132	HD9	7+
Antoinette Webb	AGW Financial Planning	50	HD9	2
Martyn Sales	Martyn Sales Financial Planning	50	HD9	2
Mark Chandler	Ellis Bates (part of Shackleton)*	133	HG1	3
Carl Hasty	Ellis Bates (part of Shackleton)*	127	HG1	3
Susan Tait	The Private Office*	105	HG1	5
Peter Johnys	Sandringham Financial Partners*	82	HG1	2
Ian Pine	Argentis	74	HG1	1
James Todd	RetireInvest	69	HG1	4
Luke Bennett	Attivo	38	HG1	2
Michael Cope	Ellis Bates (part of Shackleton)*	32	HG1	1
Christopher Jones	True Potential	30	HG1	1
Chris Simpson	Forvis Mazars*	29	HG1	2
Peter Arundell	Evergreen Financial Planning	22	HG1	1
George Isherwood	Ellis Bates (part of Shackleton)*	16	HG1	1
Josh Gardner	Christopher Little & Co*	19	HG3	1
Mike Jenner	Jenner Wealth Management	26	HG4	1
Tristan Burd	Forrester Boyd Wealth Management*	62	HU1	3
Lewis Hames	Premium Financial Planning Services	13	HU1	1
Christian Derrick	Stephenson Johnson Financial Planning	414	HU13	6
Andrew Piper	Stephenson Johnson Financial Planning	41	HU13	1
James Dry	Stephenson Johnson Financial Planning	14	HU13	1
Joanne Baker	Yorkshire Financial Planning	95	HU15	4
Caroline Allen	Yorkshire Financial Planning	50	HU15	4
Ricardo Da Silva	Linkage Financial Solutions	118	HU17	1
Martyn Pottage	Armstrong Watson	44	HU17	3
Phil Jones	Forrester Boyd Wealth Management*	35	HU17	3
Catherine Richardson	Navigation Wealth Management	63	HU18	2
Toby Turner	IFT Wealth Management	96	HX1	4
Sam Johnson	Sovereign Wealth	19	HX1	1
Ross McFadzean	Perspective	38	HX6	1
Jonathan Myers	Perspective	27	HX6	1
Alan Worthington	Capstone Financial	128	L1	5
Wayne Slater	Spectrum IFS	110	L1	6
Sam Inkson	Markland Hill Wealth	82	L1	2
Philip Edward	Edward Asset Management*	64	L1	2
Michael Carlyle	TheWealthPoint	51	L1	4
James Highton	Sedulo Wealth*	37	L1	1
Lydia Needham	Lydia Grace Wealth Management	36	L1	1
Carl Mba	Carl Mba Financial Planning	27	L1	2
Michael Edward	Edward Asset Management*	22	L1	1
Ethan Tellett	Sedulo Wealth*	19	L1	1
John Price	Modus WM	17	L1	1
Neil Ferguson	Modus WM	13	L1	1
Sanjay Gambhir	TheWealthPoint	95	L2	5
Sam Hulson	First Equitable	30	L2	1
Sean McDermott	LightSide Financial Planning*	203	L23	2
Josh Brooks	Markland Hill Wealth	61	L23	1
Chris Lunt	Chris Lunt IFA	337	L31	7+
Joseph Stevens	True Potential	350	L39	7+
Angela Maher	Acumen Financial Partnership	131	L39	7+
Charlie Sas	Richard Bamber & Company	20	L39	1
Chris Wheatman	Advice Matters Financial Planning*	149	LA1	6
James Larton	Truly Independent	76	LA1	7+
Ben Urlotti	Pursuit Financial Planning*	30	LA14	1
Paul McGregor	Pursuit Financial Planning*	106	LA15	3
Kim Warburton	Pursuit Financial Planning*	21	LA15	1
Gareth Nicholson	True Potential	95	LA23	1
Darren Hancock	Sandringham Financial Partners*	70	LA4	2

VOUCHEDFOR'S TOP RATED FINANCIAL ADVISERS

Ashley Magean	Azets Wealth Management*	81	LA9	2
Barry Fitzsimmons	Armstrong Watson	23	LA9	2
Michael Usher	Armstrong Watson	12	LA9	1
Ben Cordiner	Cordiner Wealth*	257	LS1	5
Darren Goodall	Informed Financial Planning	201	LS1	5
Julian Baker	Live Smart Financial Planning	142	LS1	3
Andrew Woolhouse	iWealth Financial	131	LS1	4
Natalie Wright	Forvis Mazars*	127	LS1	5
Martin Archdale	MAP Financial Planning	114	LS1	5
Vinny Lal	VSL Wealth Management	101	LS1	1
Phillip Chambers	Chambers Financial Solutions	97	LS1	4
Mathew Lamping	Ascot Lloyd*	95	LS1	4
James Bowers	Sovereign Wealth	82	LS1	6
Rob Pentelow	Pentelow Wealth Management	80	LS1	4
Adam Green	Forvis Mazars*	75	LS1	5
Tony Padgett	The Private Office*	74	LS1	2
Carl Ward	Forvis Mazars*	70	LS1	5
Christie Tillett	The Private Office*	68	LS1	3
Richard McKeown	Sovereign Wealth	63	LS1	4
Sarah Beall	The Private Office*	53	LS1	2
Yasir Al-Din	Zplan Wealth Management	50	LS1	5
Sham Ahmed	Arcus Wealth	37	LS1	1
Patrick Rowan	Forvis Mazars*	36	LS1	2
Chris Thorpe	Agile Independent Financial Advice	20	LS1	2
William Forwood	Sovereign Wealth	18	LS1	1
Bradley Edens	Forvis Mazars*	16	LS1	1
Anny Lian	Fatgreen Wealth	13	LS1	1
Martin Parnham	Armstrong Watson	13	LS1	1
Alex Barton	Barton Associates Financial Planning	12	LS1	1
Benjamin Walsh	Armstrong Watson	11	LS1	1
Mark Hinchliffe	Sandringham Financial Partners*	106	LS16	2
Thomas Hatley	Christopher Little & Co*	141	LS21	7+
Richard Marshall	Christopher Little & Co*	67	LS21	3
Sean Gilks	Vista Financial Management	65	LS21	1
James Marlow	Priority Wealth Planning	54	LS21	4
Tom Stones	North Yorkshire Financial Planning	155	LS22	4
Richard Dickinson	Dickinson Wealth Management	112	LS22	4
Ryan Wiggins	DWB Wealth Consultancy	24	LS22	1
Andrew Elson	Berry & Oak	149	LS23	4
Jen Margison	Ayla Wealth Management	39	LS25	1
Daniel Lea	The Private Office*	165	LS28	4
Mark Chicken	The Private Office*	64	LS28	2
Catherine Casey	Rockwood Financial Solutions	48	LS28	1
Robert Morse	The Private Office*	68	LS29	2
Sarah Siddons	Bowcliffe Wealth Management	49	LS29	1
Spencer Bennett	Argentis	32	LS29	1
Michael Breen	HF Wealth	27	LS29	1
Dan Riley	Bowcliffe Wealth Management	22	LS29	2
Neil Davies	HF Wealth	13	LS29	1
Daniel Foy	Forvis Mazars*	124	M1	5
Richard Clayton	Old Royle Wealth Management	122	M1	1
Adrian Edwards	Sylvan Financial Management	90	M1	4
Jeremy Agorom	Whitfield Wealth Management.	90	M1	2
Sarah Hogan	KBA FS*	84	M1	5
David Shepherd	Dragon Wealth	71	M1	4
Jamie Lowe	True Self Wealth	70	M1	2
Jose Vilchez	Sedulo Wealth*	58	M1	1
Thomas Scrupps	Forvis Mazars*	51	M1	2
Jonathan Fisher	Sedulo Wealth*	37	M1	1
Emma McNulty	Cullen Wealth	34	M1	2
Samuel Hartley	True Potential	22	M1	2
Kathy Whatmough	Rice Whatmough Crozier*	17	M1	1
Matt Laing	Cullen Wealth	17	M1	1
Colin Bates	Chapter3 Financial Planning	38	M21	3

Steven Jarzyna	SMJ Financial Planning	78	M24	1
Ken Whitworth	True Potential	114	M27	1
David Bell	Retirement Professionals*	76	M28	3
Darius Jalali	Stratton Wealth Management	140	M3	1
Joanne Hobson	Quilter Financial Advisers	80	M30	5
Darren Burnett	Burnett & Co Financial Planning	281	M33	7+
Harvey Sutton	Suttons Independent Financial Advisers*	131	M33	1
Ben Preston	Suttons Independent Financial Advisers*	120	M33	4
Steven Walker	Suttons Independent Financial Advisers*	118	M33	4
David O'Connor	iPensions Wealth	73	M33	3
Saf Sulehman	Suttons Independent Financial Advisers*	73	M33	3
Luke Mather	Suttons Independent Financial Advisers*	62	M33	4
Mark Galligan	MGT Financial Planning	48	M33	4
Simon Baggott	Suttons Independent Financial Advisers*	46	M33	4
Chris Pughe	Suttons Independent Financial Advisers*	25	M33	1
Natalie Turner	Natalie Turner Wealth Management*	234	NE1	4
Geoff Caisley	Newcastle Financial Advisers*	221	NE1	5
Mark Brett	Abacus Associates	140	NE1	3
Ben Hughes	Doxford Financial	121	NE1	2
Neil Henderson	Mission Financial Planning	98	NE1	3
Amy Burge	Ellis Bates (part of Shackleton)*	91	NE1	3
Omar Din	Azets Wealth Management*	86	NE1	4
Ryan McGuinness	1894 Private Wealth	66	NE1	3
Deborah Trelease	Azets Wealth Management*	57	NE1	2
John Hinson	RetireInvest	50	NE1	1
Mike Hartness	Azets Wealth Management*	48	NE1	1
Wayne Marshall	Newcastle Financial Planning	33	NE1	1
Steven Whitehead	Azets Wealth Management*	32	NE1	1
Ebie Holmes	Cullen Wealth	25	NE1	1
Fiona Scorer	Azets Wealth Management*	24	NE1	1
David Tait	Azets Wealth Management*	20	NE1	1
John Peacock	True Potential	18	NE1	1
Jamie Tocher	Perspective	16	NE1	1
Martin Lebovitch	Azets Wealth Management*	15	NE1	1
Stephanie McClarence	Continuum	15	NE1	1
Nick Swinhoe	Azets Wealth Management*	14	NE1	1
Jack Ford	Azets Wealth Management*	12	NE1	1
Joshua Clark	Perspective	11	NE1	1
Joanne Hendry	Newcastle Financial Advisers*	107	NE20	5
David Bolam	Newcastle Financial Advisers*	119	NE21	5
Tom Robertshaw	True Potential	10	NE21	1
Tom Parkin	Newcastle Financial Advisers*	174	NE23	5
David Mitchell	Newcastle Financial Advisers*	114	NE26	5
Edward Midgley	PSG Wealth Management	66	NE26	3
Sara Guy	Ellis Bates (part of Shackleton)*	65	NE26	3
Charlie Wallace	Four Rivers Financial Planning	112	NE28	1
Harriet Wallace	Four Rivers Financial Planning	21	NE28	1
Rachael Hall	Seven Stars Private Wealth	89	NE29	1
Alex Turnbull	Newcastle Financial Advisers*	80	NE29	3
Paul Richardson	Amethyst Independent Financial Advisers	77	NE29	1
John Wilkinson	Amethyst Independent Financial Advisers	70	NE29	2
David Simpson	Newcastle Financial Advisers*	109	NE3	5
Stacey Arcus	Quilter Financial Advisers	72	NE31	5
Glen Stephenson	True Potential	279	NE33	4
Mark Winship	Newcastle Financial Advisers*	123	NE33	5
Mike Weedon	Quilter Financial Advisers	111	NE33	5
David Jackson	True Potential	32	NE35	1
Garth Thompson	Emerald Financial Associates	57	NE45	1
April Parrish	Emerald Financial Associates	14	NE45	1
Karl Lamb	Newcastle Financial Advisers*	163	NE46	5
Gary Barnes	Lifeplan Financial Management*	115	NE46	1
Ryan Anderson	Armstrong Watson	47	NE46	4

VOUCHEDFOR'S TOP RATED FINANCIAL ADVISERS

NORTH ENGLAND

NAME	FIRM	REVIEWS	LOCATION	YEARS QUALIFIED
Chris Marsh	Cullen Wealth	46	SK10	2
Ralph Pettengell	Pettengell Wealth Management	35	SK10	1
Phil Shirley	CAPS Financial	13	SK10	1
Dan Altman	Consilium Financial Services	12	SK10	1
Tom Heaword	Camargue Chambers	128	SK8	5
Jane Patrick	Sylvan Financial Management	84	SK8	4
Ed Painter	Sylvan Financial Management	72	SK8	4
Chris Brennan	Blackstone Financial Management	52	SK8	2
Andrew Winstanley	Sustainable Financial Planning	49	SK8	3
Kai Ansari	Cullen Wealth	27	SK8	2
Andrew Day	Depledge	239	SK9	7+
Rob Patten	Individual Financial Services*	238	SK9	6
Richard Wilkinson	Wilkinson Financial Management*	222	SK9	4
Dacre Staines	DBL Asset Management*	158	SK9	2
Mark Easter	DBL Asset Management*	47	SK9	2
Lucy Hall	Newcastle Financial Advisers*	66	SR1	2
Steven Collinson	Stephen Hope Wealth Management	46	SR1	2
David Hardman	DMH Private Wealth	105	SR3	7+
Joe Bonalite	Inspire Financial North East	59	SR5	1
Nicola Tempest-Hall	Nth Degree Financial Planning	67	SR7	3
Elliot Tate	Newcastle Financial Advisers*	25	TD15	1
Grant Kelly	Newcastle Financial Advisers*	80	TS1	5
Trevor Shelley	Ellis Bates (part of Shackleton)*	95	TS12	3
Tom Horner	MG Shaw	70	TS18	4
Simon Warne	New World Financial Group	41	TS18	3
Michael Walker	Perspective	20	TS18	1
Don Axtell	True Potential	177	TS22	7+
Jonathan Loughran	Azets Wealth Management*	29	TS22	1
Iain Paterson	Newcastle Financial Advisers*	107	TS24	5
David Barber	DMB Wealth Management	106	TS27	2
Aimee Watson	7FP	82	TS27	5
Olivia Vickers	Newcastle Financial Advisers*	78	TS9	2
James Collins	Cheshire Wealth Partnership	204	WA1	7+
Matt Fleming	Fleming & Co Wealth Management	156	WA1	3
Robert Newton	Chartwell Financial Services*	59	WA1	1
Praful Mistry	Cullen Wealth	51	WA1	2
Garnet Ronander	Perspective	47	WA1	1
Gary Newton	Chartwell Financial Services*	46	WA1	1
Sophie Stradins	Perspective	12	WA1	1
Allie Baglow	Allisons Financial Planning	171	WA10	2
Paula Payne	Tailored Financial Planning*	161	WA10	4
Christopher Frodsham	Tailored Financial Planning*	51	WA10	2
Linda Foulkes	Tailored Financial Planning*	22	WA10	1
Daniel Martin	Tailored Financial Planning*	20	WA10	1
Kevin Quinn	Adamson Ross	30	WA12	2
Anna Kember	Adamson Ross	29	WA12	2
Andy Williamson	Fairstone	15	WA13	1
Chris Weetman	Otus Financial Planning*	167	WA14	2
Andrew Wood	MKC Wealth	118	WA14	2
Garry Robinson	Elite Financial Planning Consultants	114	WA14	5
Carl Hayes	MKC Wealth	100	WA14	2
Nick Bone	Nicholas Bone Financial	48	WA14	3
David Brown	True Potential	95	WA15	6
David Smith	Forethought Financial	153	WA16	5
Justin Heap	Swiftsure Wealth Management	68	WA16	1
James Sinclair	Nice Associates Wealth Strategies	43	WA16	1
Paul Rowling	Apogee Wealth Management	39	WA16	1
Louise Pickford	Apogee Wealth Management	30	WA16	1

Ed Stubbs	Xentum	28	WA16	1
Nick McCulloch	Apogee Wealth Management	25	WA16	1
Janine Wilson	Apogee Wealth Management	22	WA16	1
David Clewlow	Apogee Wealth Management	21	WA16	1
Simon Hardstaff	Apogee Wealth Management	19	WA16	1
Stephen Davies	Apogee Wealth Management	11	WA16	1
Andrea Connor	Jones Regan Wealth Management	20	WA7	1
Angeline MacLaren	Navigation Wealth Management	163	WF1	5
Kate Bailey	Kate Bailey Financial Planning	85	WF1	2
Ryan Milne	Kate Bailey Financial Planning	77	WF1	2
Gordon Wills	Wills Financial Consultancy	55	WF1	1
Jake Slack	Navigation Wealth Management	33	WF1	2
Daniel De Block	Navigation Wealth Management	13	WF1	1
Darren Parker	True Potential	164	WF10	6
Matthew Hawksworth	Ellis Bates (part of Shackleton)*	84	WF10	3
Darron Whitehead	Fairstone Liversedge	251	WF14	7+
Ray Garnett	Fairstone Liversedge	152	WF15	1
Thomas Harper	Harper Financial Associates	120	WF4	5
Ash Patel	Camargue Wealth	110	WN7	6
Al Spall	MAP Financial Planning	138	YO1	7+
Deb Jacobs	PenLife Associates	130	YO1	3
Mark Fisher	Ardent Financial Planning	121	YO1	5
Nick Lawson	HGH Wealth Management	96	YO1	1
Ruth Norman	Ardent Financial Planning	90	YO1	5
Tom Hughes	PenLife Associates	86	YO1	2
Gary O'Brien	Ardent Financial Planning	71	YO1	1
Louis Maddison	PenLife Associates	62	YO1	3
Adam Dent	PenLife Associates	49	YO1	3
Nicola Page	Nicola Page Financial Solutions	47	YO1	4
James Wadsworth	PenLife Associates	42	YO1	2
Craig Howard	PenLife Associates	41	YO1	2
Niall Middleton	Minster Financial Planning	41	YO1	2
Matthew Sharp	Sharp Financial Planning	35	YO1	1
Soyfur Rahman	PenLife Associates	34	YO1	2
Alan Broadhead	Equinox Financial Planning	30	YO1	1
Iain Scott	Equinox Financial Planning	27	YO1	2
Harry Mays	AFH Wealth Management	24	YO1	2
Richard Booth	Richard Booth Wealth Management	228	YO11	4
Luke Dobson	Moneyweb	22	YO11	1
Tina Steele	Steele Aspire Financial Management	99	YO12	4
Elliot Kuppusamy	Moneyweb	222	YO13	4
Paulina Worthington	Klara Wealth	42	YO12	2
John Hough	Newcastle Financial Advisers*	94	YO18	5
Matthew Leadley	UK Financial Planning	15	YO25	1
Chris Lambert	Educate Financial	56	YO8	1

NORTHERN IRELAND

Gareth Elliott	Newbridge Financial Planning*	188	BT1	7+
Michael Hamill	Navigate IFA	88	BT1	3
Russell Hathaway	NI Money	79	BT1	5
Paul McCoubrey	Navigate IFA	77	BT1	3
Trevor Johnston	Platinum Financial Planning*	76	BT1	2
Philip Andrews	Platinum Financial Planning*	69	BT1	2
Will Clow	Platinum Financial Planning*	60	BT1	2
Jonathan Scott	Platinum Financial Planning*	58	BT1	2
Paul Muckle	Quilter Financial Advisers	51	BT1	1
Gillian Walsh	IQ&Co	48	BT1	4
Jay Price	IQ&Co	37	BT1	1
Johanna Rooney	Platinum Financial Planning*	37	BT1	2
Matt Greer	Navigate IFA	37	BT1	3
Alastair Moore	AAB Wealth Chartered Financial Planners*	33	BT1	2
Michael Geddis	Platinum Financial Planning*	22	BT1	2

Simon Moore	Aligned Financial Planning	60	BT18	2
Tanya Martin	IQ&Co	54	BT18	4
Mark Weatherall	IQ&Co	26	BT18	1
Heather McConaghie	IQ&Co	54	BT20	3
Stephen Bell	True Potential	30	BT20	1
Richard Girvan	Ardent Wealth	37	BT27	3
Dale Kirkpatrick	Modulus Financial Planning	64	BT32	3
John Sloan	Modulus Financial Planning	39	BT32	3
Diane Pankhurst	IQ&Co	40	BT36	3
Alastair Hall	IQ&Co	23	BT36	2
Christopher Todd	Hills Financial Planning	47	BT40	2
Jack White	Hills Financial Planning	14	BT40	1
Paul Chada	True Potential	113	BT45	1
Laura Collins	Ardent Wealth	49	BT47	3
Neill Gregson	NG Wealth Management	58	BT67	4
Gary Dickson	Milecross Financial Solutions	34	BT7	2
Colin McHugh	Temple Gray	34	BT79	2
Ciaran Scullion	From Acorns Financial Planning	91	BT80	1

SCOTLAND

Martin Welsh	Welsh & Taylor Wealth*	122	AB10	5
Kieran Taylor	Welsh & Taylor Wealth*	115	AB10	5
Steven Mcknight	McKnights Associates Wealth Management	91	AB10	1
Alan Rutherford	Alan Rutherford Wealth Management	89	AB10	1
Rory Craig	Russell Gibson Financial Management*	76	AB10	1
Alan Ball	Russell Gibson Financial Management*	71	AB10	1
Adam Sinclair	Adam Sinclair & Associates	60	AB10	1
Zyg Krukowski	McKnights Associates Wealth Management	58	AB10	1
Tom Hyslop	Russell Gibson Financial Management*	52	AB10	1
Sean Mills	McKnights Associates Wealth Management	51	AB10	1
Scott Morrison	Charles Stanley*	46	AB10	1
Liviu Bocancia	Welsh & Taylor Wealth*	24	AB10	1
Emma Gibb	Russell Gibson Financial Management*	22	AB10	1
April Ritchie	Mattioi Woods	21	AB10	2
Laura Pike	The Pike Partnership	15	AB10	1
Martyn Paterson	AAB Wealth Chartered Financial Planners*	129	AB32	2
Kelly Shek	AAB Wealth Chartered Financial Planners*	37	AB32	1
Lisa Tait	AAB Wealth Chartered Financial Planners*	35	AB32	2
Claire Marston	AAB Wealth Chartered Financial Planners*	27	AB32	1
Peter Hope	Acumen Financial Planning	21	AB32	1
Elaine Clunie	Buchan Wealth Management	66	AB39	5
Neil Aspinall	Truly Independent	116	AB52	5
Dave Murray	Dave Murray Wealth Management	34	DD1	3
Alan Dunn	Alan Dunn Financial Management	17	DD1	1
Cary Stewart	CNS Financial Solutions	30	DD11	2
Andrew Finnie	Border Finance	1731	DG1	7+
Steven Conchie	Armstrong Watson	42	DG1	2
Allan Moffat	Carron Financial Services	107	DG12	5
Kathryn Tomlinson	Calton Wealth Management	204	EH1	7+
Graeme McNally	Mearns & Company*	145	EH1	1
Kenny Stevenson	Forvis Mazars*	93	EH1	3
Aurelija Buckute	Mearns & Company*	88	EH1	1
Malcolm Steel	Mearns & Company*	81	EH1	1
Adrian Hanger	ADH Wealth Management	68	EH1	5
Carley Mearns-Begley	Mearns-Begley Wealth Management	65	EH1	5
Richard Johnston	AAB Wealth Chartered Financial Planners*	65	EH1	3
Jason Baggott	Tweed Wealth Management	61	EH1	3
Sam Cowan	Charles Stanley*	57	EH1	1
Paul McCabe	Acumen Financial Planning	55	EH1	1
Casey Crooks	True Potential	54	EH1	3
Simon Boyd	Simon Boyd Financial Management	54	EH1	3
Tom Barbour	T R Barbour Financial Planning	45	EH1	2
Lesley Mackintosh	Independent Women*	44	EH1	1
Scott Mackintosh	Alpha Wealth	39	EH1	3

Angus Kirk	Transform Financial Planning	28	EH1	2
Louis Murray	Succession Wealth	24	EH1	1
Jonathan Barkey	Jonathan Barkey	23	EH1	1
Will Bleasdale	Azets Wealth Management*	23	EH1	1
Lindsey Docherty	Independent Women*	16	EH1	1
Alex Hill	Kellyhill Financial Planning	12	EH1	1
Conrad Balatoni	Balatoni Financial Planning	47	EH12	1
Karen Lauder	Intelligent Pensions	17	EH17	1
Steven Guthrie	Guthrie Wealth Consultancy	65	EH18	5
Katie Ridland	Ridland Wealth Management	74	EH2	4
Keith Roseburgh	Keith Roseburgh Financial	78	EH22	5
Kenneth Murphy	House of Shields Financial Advice	78	EH22	1
Gavin Middlemiss	Middlemiss and Associates	82	EH39	1
Ranald Hall	Gilson Gray Financial Management	39	EH39	1
Craig Davidson	C. Davidson Financial Planning	66	EH4	1
Stuart McAdam	Stuart McAdam Wealth Management	33	EH4	2
Rachel Stewart	Traprain Financial	98	EH40	4
Andrew Middlemiss	Middlemiss and Associates	248	EH42	5
Raymond Broomfield	AFH Wealth Management	124	EH42	5
Vincent Throp	Throp Financial Planning	258	EH49	5
Graeme Inglis	Poise Financial Planning	178	EH49	5
Martin Heslop	Sutherland Mayfair Financial Planning	52	EH49	2
Colin Welsh	Ellis Bates (part of Shackleton)*	126	EH54	3
Lucy Logan	Calderwood Financial	47	EH54	1
Steven Auldjo	Dynamic Wealth Solutions	16	EH54	1
Katrina Bruce	Mearns & Company*	107	EH6	1
Sean Gilbert	Select Wealth Managers	107	FH8	6
Kirsty McAuliffe	Invest Retire Protect	24	FH8	1
Neil Miller	Truly Independent	90	FK1	6
Darren Burns	DPB Wealth Management	63	FK5	4
Dani-Rose O'Ryan	Invest Retire Protect	40	FK5	1
Graham Brodie	Succession Wealth	144	FK8	7+
Robbie MacKillop	17 Wealth Management*	243	G1	5
Ryan Gray	Ascot Lloyd*	207	G1	2
David Wright	Ascot Lloyd*	188	G1	2
Dhanwal Chandan	Just Financial Group.	169	G1	1
Nadav Brown	Ascot Lloyd*	148	G1	1
Stuart Lamont	Waverton Wealth Planning	136	G1	5
Andrew Conway	One Financial Solutions*	130	G1	6
Alan Knox	Financial Succession*	114	G1	1
Nadeen Watson	Spectrum Wealth Group	103	G1	3
Colin Campbell	Forvis Mazars*	102	G1	5
Lynn Healy	Ascot Lloyd*	99	G1	2
Jordan Cairney	Ascot Lloyd*	84	G1	2
Vihar Shah	Forvis Mazars*	82	G1	4
Bobby Welsh	Simple Financial Planning	65	G1	1
Angela Proctor	APC Financial Solutions*	63	G1	1
Brian McNicol	Armstrong Watson	62	G1	5
Siobhan Mullaney	Independent Financial Advice Centre	57	G1	2
Graeme Melrose	McCrea Financial Services*	49	G1	1
Jonathan Campbell	McCrea Financial Services*	48	G1	1
Farzana Khan	AFH Wealth Management	47	G1	4
Lynne Meek	APC Financial Solutions*	43	G1	1
Darrel Jones	Financial Succession*	38	G1	1
Keith Brooks	Paramount Wealth Management	34	G1	1
Chris Bain	McCrea Financial Services*	33	G1	1
Michael Macadam	McCrea Financial Services*	32	G1	1
Adam Tweedie	Cove Wealth Management	23	G1	1
Katherine Diamond	Forvis Mazars*	23	G1	1
Grant Hutton	Hunter Wealth Management	20	G1	1
Cameron Bone	Forvis Mazars*	18	G1	1
Sophie Tinney	Intelligent Pensions	16	G1	1
Jordan Mushet	Pivotal Financial Planning	14	G1	1
Lyle Douglas	Kellyhill Financial Planning	14	G1	1

VOUCHEDFOR'S TOP RATED FINANCIAL ADVISERS

Kevin Campbell	Campbell Financial Services	10	G1	1
Renata Cook	Renata Cook Wealth Management	77	G2	3
David Charnley	Southern Financial Services	102	G71	7+
Ian Galston	2plan Wealth Management	120	G74	2
Graeme Crooks	Newlands Financial Planning	36	G74	1
Clayton Cumming	True Potential	410	G81	7+
Mike Rafter	True Potential	26	G83	1
Louise Mackenzie	Highlands & Islands Financial Advice	13	HS1	1
Mary MacFarlane	Mary MacFarlane Financial Planning	208	IV1	5
Darran Murphy	Tweed Wealth Management	63	IV1	2
Daniel Murdoch	57 North Financial Planning	52	IV1	1
Jake Bernardi	57 North Financial Planning	45	IV1	1
Nick Callaghan	JC Roxburgh	169	KA10	7+
Jacqueline Hillan	JC Roxburgh	79	KA10	2
John Maxwell	MX Independent Financial Services*	259	KA30	6
Michael McGinty	Sandringham Financial Partners*	77	KA30	6
Richard Webb	Pia Financial Solutions	123	KA7	1
Kevin Owens	One50 Financial Planning	93	KA7	5
Mike Baxter	Radiant Financial Planning	87	KY1	1
David Cameron-Harper	Cairn Independent	53	KY1	2
Will Burns	Carnethy Wealth	62	KY11	3
Sarah Miller	Bay Financial Planning	51	KY11	1
Jean Dawson	More Than Mortgages	115	KY13	4
Amy Ireland Hexley	Destination Wealth	14	KY15	1
Michael McLintock	Adelp Financial Solutions	106	ML11	7+
David Clark	True Potential	39	ML11	1
Thomas Marshall	S W Financial Management	191	ML3	7+
Euan McAuliffe	McPherson Wealth	54	ML4	1
Kafai Wong	Key Financial Wealth Solutions	187	ML5	3
Stephen McMahon	One Financial Solutions*	79	ML6	6
Robert Allan	Independent Financial Advice Centre	66	PA1	3
Natalie Donnell	Flying Colours Advice	23	PA1	1
Carl Melvin	Affluent Financial Planning*	383	PA11	7+
Martin Joyce	Brierie Financial Planning	98	PA11	6
Darren Watson	Affluent Financial Planning*	44	PA11	1
Jennifer Arthur	Money Advice & Planning	28	PA15	1
Craig Malcolm Bush	Money Advice & Planning	44	PA4	2
Gordon Young	Azets Wealth Management*	30	PA4	1
Colin Macdonald	Phoenix Wealth Solutions	23	PA5	1
Josh Kinning	Phoenix Wealth Solutions	17	PA5	1
Andrew Stewart	A S Wealth Management	65	PH1	5
Craig Herd	Radiant Financial Planning	15	PH1	1
Beverley Riddell	Global Advice Group	38	TD6	2

VOUCHEDFOR'S TOP RATED FINANCIAL ADVISERS

SOUTH EAST ENGLAND

NAME	FIRM	REVIEWS	LOCATION	YEARS QUALIFIED
Gavin Foster	Ascot Lloyd*	129	GU33	2
Stuart Brown	Eight Wealth Management	221	GU34	5
Nick Winter	Quilter Financial Advisers	26	GU34	2
James Gill	J G Wealth	139	GU51	5
Geoff Day	Wilcox Day Wealth Management	128	GU51	6
Andrew Coles	Ovation Finance*	76	GU51	5
Paul Scott	Scott Financial	70	GU51	1
Dean Fermie	Beals Mortgage and Financial Services	48	GU51	2
Tracyann Johnson	Johnson Wealth Solutions	47	GU51	3
Aaron Ward	Award Financial Planning	22	GU51	1
Andrew Lee	One Financial Solutions*	134	GU6	6
Rupert Miller	Bramley Financial Planning	89	GU6	6
Kevin Gatland	Gatland Wealth Management	49	GU7	1
Mark Daunter	Oculus Wealth Management Hampshire	27	GU7	1
Tom Garsed-Bennet	Flying Colours Advice	94	GU9	3
Richard Gross	Church's Financial Planning	61	GU9	4
Sarah Nesbitt	The Private Office*	58	HP11	2
Joel Wood	Wealth & Finance Matters	34	HP11	1
Nathan Gonsalves-Williams	Twelve Wealth Management	31	HP19	1
David Mills	Ridgeways	30	HP19	1
Catherine Simmonds	Mentmore Financial Planning	56	HP23	5
Martin Potter	Potter Financial Partners	20	HP23	1
Alex Hatfield	The Private Office*	180	HP27	7+
Ross Lambert	Forvis Mazars*	154	HP4	5
Robert Stringer	Stringer Mann Chartered Financial Planners	53	HP4	4
Ed Evans	Aurelian Financial Planning	34	HP4	3
Karen Berisford	FirmStone Wealth	50	HP5	1
Lewis McGonigal	Perspective	13	HP5	1
Sunil Karia	Perspective	12	HP5	1
Julia Keith	Succession Wealth	57	HP6	1
Keith Smithson	Succession Wealth	52	HP6	2
Alan Drysdale	AGILITY Financial Advisers	27	HP6	1
Alistair Norton	GHL Direct	381	LU1	7+
Christopher James	Wealth Matters	57	LU1	5
Tony Sareen	TDS Financial	45	LU7	2
Jonathan Hales	LenRose Wealth Management	40	ME10	1
Tobias Cobb	Aitana Financial Services	36	ME13	2
Steve Ivory	Fidelius*	144	ME14	2
Vikram Deb	McMillan Wealth Consultants	139	ME14	1
James Etheridge	Focused Financial*	122	ME14	5
Harry Donoghue	The Private Office*	70	ME14	2
Sarah-Jayne Ives	SJ Wealth Management	87	ME19	3
Derek Scott	Scott & Associates Financial Planning	38	ME19	1
Tony Barker	Barker Financial Planning	51	ME2	1
Ryan Rispoli	Lombard Wealth Associates	41	ME2	1
Wayne Smith	WLS Investment Partnership*	148	ME4	2
David Ruler	David Ruler Financial Planning	175	ME6	7+
Nikki Pipping	Collective Financial Planning	149	MK14	5
John Clements	True North Financial Planning	53	MK16	4
Tom Warren	Warren Wealth Management	40	MK19	2
Robert White	Whiteleaf Financial Planning	10	MK3	1
Tony Byrne	Wealth and Tax Management	208	MK4	6
Jat Bubbra	Wealth and Tax Management	71	MK4	2
Jonathan Miller	365ifa	101	MK40	2
John Howson	Stellar Financial Planning	74	MK40	5
Emily Pool	Happy Planet Financial Planning	60	MK40	5
Aga Drozd	Harrison James Financial Planners	55	MK40	1
Heide Swift	Heide Swift Financial Planning	151	MK45	4

Darren Hutton	Collective Financial Planning	14	MK45	1
Nicola Watts	Jane Smith Financial Planning*	163	MK46	6
Bob Gibbs	Bob Gibbs Financial Planning	376	MK9	7+
Andrew Flowers	Vizion Wealth*	224	MK9	4
Nicholas Hamilton	Forvis Mazars*	112	MK9	2
Matthew Brooks	The Cosgrove Partnership	89	MK9	3
Jenny Stones	Jules Murphy Financial Planning	70	MK9	1
Faisal Khan	AFH Wealth Management	59	MK9	2
Cholpon Djanuzakova	Wealth and Tax Management	40	MK9	4
Sam Malka	Scottsdale Lifetime Partners	36	MK9	3
Teian Hatt	Vizion Wealth*	29	MK9	1
Erin Rigault	Mycontinuum.co.uk	119	OX1	1
Adam Gibson	Argentis	54	OX1	2
Tony Pound	2plan Wealth Management	21	OX1	1
Alex Roberts	Wise Investment	79	OX10	3
Peter Cuthbertson	Frizzell Wealth Management	29	OX10	1
Steve Ruane	Frizzell Wealth Management	20	OX10	1
Donald Tsang	Frizzell Wealth Management	18	OX10	1
Tasha Mulford	Frizzell Wealth Management	15	OX10	1
Neil Anns	Anns and Grange Associates	29	OX12	2
Steven Corrigan	Sandringham Financial Partners*	107	OX14	2
Philip Hanley	Philip James IFA*	636	OX18	7+
Sian MacInnes	Callabas Financial Services	326	OX18	7+
Michael Piper	Temple Piper Financial Planning	34	OX18	2
Sam Monk	MKC Wealth	118	OX28	2
Jonathan Hunt	Expert Wealth Management*	117	OX28	5
Gary Hamilton	AFH Wealth Management Cookham	103	OX28	1
Ady Suter	TWM Financial Planning	80	OX28	4
Simon Neal	Cornerstone Financial Planning	42	OX28	3
Ben Anderson	Williamson Wealth Management	22	OX28	1
Dominic Spalding	Expert Wealth Management*	122	OX29	5
Harj Heer	Logic Financial Services	89	OX49	6
Paul Davidson	Strategic Vision Wealth Management*	140	OX5	6
Frankie Davis	Attivo	55	PO1	1
Laura Bailey	Sterling & Law	25	PO13	2
Ian Riggs	Eight Wealth Management	333	PO14	5
Jason Eldrid	Sheraton Financial Planning*	250	PO14	7+
Nick Clegg	Eight Wealth Management	121	PO14	1
David Gallagher	Capital Planning Partners	118	PO14	3
Ian Batterbee	Sterling & Law	108	PO14	4
Sasha McKee	Eight Wealth Management	66	PO14	2
Mark Holmes	Eighteen Wealth Planning	60	PO14	1
Emma Farmer	AFH Wealth Management	58	PO14	4
Sarah Quirk	Sarah Quirk Wealth Associates	48	PO14	1
Andy McKee	Eight Wealth Management	39	PO14	2
Dave Tomlinson	Eight Wealth Management	38	PO14	1
Larry Clarke	Lawrence Clarke	36	PO14	1
Susette Bowden	Lawrence Clarke	31	PO14	1
James Murphy	Lawrence Clarke	20	PO14	1
Mike Osmond	Lawrence Clarke	15	PO14	1
Paul Davis	Lawrence Clarke	15	PO14	1
Simon White	Lawrence Clarke	14	PO14	1
Kelley Duncan	Lawrence Clarke	25	PO15	1
Robert Brealey	Abbotstone Financial Solutions	155	PO16	7+
Paul D Brown	Ascot Lloyd*	124	PO19	2
Brad Ainsworth	Cathedral Wealth Management	123	PO19	6
Michael Fowler	Succession Wealth	52	PO19	2
Tom Bate	Attivo	49	PO19	2
Brian Martin	Argentis	47	PO19	2
Peter Greenwood	Greenwood Wealth Solutions	41	PO19	2
Sally Austin	Austin Wealth Management	34	PO19	1
Josh Farrow	Cathedral Financial Management	28	PO19	2
Lottie Kent	True Financial Design	23	PO19	1

Andy Hara	Harbour Wealth Planning	13	PO19	1
Paul Wade	Aspen Wealth Management	199	PO33	2
Nigel Francis	Nigel Francis	78	PO4	3
Jacqueline Wilson	Sandringham Financial Partners*	48	PO4	3
Mark Higgins	Argentis	136	PO7	2
Matthew Porter	Argentis	96	PO7	2
Graham McIntyre	Argentis	81	PO7	2
Chris Allen	Christopher Allen	71	PO7	2
Daniel Humphrey	Argentis	57	PO7	2
Paul Ford	Argentis	52	PO7	1
Guy Freeman	Argentis	51	PO7	1
Philippa Cowan	Argentis	49	PO7	2
Robert Payne	Argentis	43	PO7	2
David Moore	Argentis	31	PO7	1
Kate Hinsley	Argentis	27	PO7	1
Peter Farrant	Argentis	27	PO7	2
Jonathan Allen	Argentis	24	PO7	1
Paul Jeffrey	Argentis	22	PO7	1
Geoff Clark	Argentis	19	PO7	1
Graham Hewitt	Argentis	13	PO7	1
Paul Yossava	Argentis	12	PO7	1
Jarrath Cush	Eight Wealth Management	119	PO9	4
Chris Poynton	Country Wealth	45	PO9	4
John Aubrey	Ascot Lloyd*	189	RG1	5
Allan Perry	Ascot Lloyd*	160	RG1	2
Mark Woodruff	Eight Wealth Management	130	RG1	1
Martin Harding	MKC Wealth	112	RG1	2
Dan Barnard	Finli	103	RG1	2
Rob Spendley	Robertsons & Crawford	88	RG1	2
Matthew Hall	Ascot Lloyd*	84	RG1	2
Paula Bicknell	Paula Bicknell Wealth	73	RG1	4
Andrew Vaughan	Vaughan Wealth	68	RG1	5
Andrew Hall	Ascot Lloyd*	58	RG1	2
Lucy Grifferty	Wholesome Financial Planning	52	RG1	4
Kendra Selzer	Philip James IFA*	35	RG1	1
Paul McFarlane	2plan Wealth Management	35	RG1	1
Matt Bicknell	Bicknell Financial Planning	34	RG1	4
Timea Toth	AFH Wealth Management Cookham	15	RG1	1
Ben Spence	Gallimore Wealth Management	12	RG1	1
Liviu Ratoi	Flying Colours Advice	36	RG12	2
George Agan	Flying Colours Advice	27	RG12	2
Lydia Wroe	Lydia Wroe Financial Planning	22	RG12	1
Christopher Peters	Flying Colours Advice	15	RG12	1
Simon Moran	Attivo	225	RG14	7+
Mark Sleeman	Ascot Lloyd*	140	RG14	5
Paul Shorten	Blacktower Financial Management	88	RG14	2
Neil Buckingham	Attivo	21	RG14	1
Mark Saunders	Simple Wealth Solutions	101	RG18	2
Sarah Blyth	Blyth Wealth Management	96	RG21	2
Ben Middleton	True Potential	90	RG21	4
Jack Saunders	iLumiti	84	RG21	3
Richard Pearce	Richard Pearce Wealth Management	53	RG21	4
Stuart Harmer	M&D Wealth Management	44	RG21	2
Ray Ingleby	Arborheath	155	RG26	4
Philip Piggins	True Potential	84	RG27	3
Joseph Webster	Webster Associates	76	RG27	1
Alexander Fry	GoddardFry Wealth Management	67	RG27	1
Josh Cardy	Eight Wealth Management	33	RG27	2
Kriss Woodward	Woodward Financial Planning	21	RG4	1
Jonathan Walsh	EBP Financial Planning	139	RG40	7+
Ray Best	UnaVida Wealth Management	135	RG40	7+
Rob Starling	Bluesky Chartered Financial Planners	68	RG40	1
Philip Mather	Velarium Wealth	63	RG40	2

VOUCHEDFOR'S TOP RATED FINANCIAL ADVISERS

Richard Dieppe	Succession Wealth	45	RG40	4
Jeremy Jackson	Bluesky Chartered Financial Planners	80	RG41	1
Tony Woodward	Quilter Financial Advisers	156	RG9	7+
Chris Gallimore	Gallimore Wealth Management	103	RG9	2
Amy Goodall-Smith	Goodall-Smith Wealth Management	32	RG9	1
Tom Frizzell	Frizzell Wealth Management	20	RG9	1
Kim Sprague	Frizzell Wealth Management	17	RG9	1
James Tilley	Frizzell Wealth Management	16	RG9	1
Tim Gurr	TK Gurr Financial Planning	50	RH10	2
Adam Reeves	Reeves Financial	171	RH12	7+
Douglas Hanbury	Horsham Financial Services	73	RH12	4
Daniel Hanbury	Horsham Financial Services	60	RH12	4
Mark Andrews	Finance Energy	46	RH12	2
Mike Smith	Beals Mortgage and Financial Services	26	RH12	2
Harry Morgan	Retire by Design	153	RH15	7+
Daniel Raggett	Attivo	32	RH15	1
Piers Bonnett	Wellesley Investment Management	13	RH15	1
Simon Arthur	Metis Wealth	91	RH16	2
Joel Wormald	Metis Wealth	80	RH16	2
George Delaney	Metis Wealth	65	RH16	2
Gordon Slocombe	Metis Wealth	50	RH16	1
Sean Guirey	The Aspire Partnership	39	RH16	3
Michael Smits	Metis Wealth	30	RH16	1
Nathan Faraday	Metis Wealth	15	RH16	1
Karin Schulte	Manow Wealth Partners	11	RH16	1
John Surgenor	Barrington Hamilton	48	RH17	2
Trevor Mitchell	Mitchell Private Clients*	78	RH18	5
Wayne Griffiths	One Financial Solutions*	173	RH2	7+
Scott Davis	3D Financial Planning	106	RH2	2
Gary Leftley	Ellis Bates (part of Shackleton)*	70	RH2	2
Christopher Gillespie	3D Financial Planning	49	RH2	4
Roger Clarke	The Private Office*	159	RH20	5
Davy Worsfold	HJP Chartered Financial Planners	56	RH4	1
Ben Moram	HJP Chartered Financial Planners	44	RH4	1
Mark Richings	HJP Chartered Financial Planners	32	RH4	2
Steven James	HJP Chartered Financial Planners	20	RH4	2
Michael Phillips	HJP Chartered Financial Planners	18	RH4	1
Simon Porter	Porter & Company	12	RH4	1
Gregor Watt	HJP Chartered Financial Planners	11	RH4	1
Michael Sharp	Sharp Wealth Management	66	RH6	5
Andy Norrington	Sterling & Law	94	RH8	5
Tom Line	Line Financial Services	58	RH8	2
Alison Tyne	Intelligent Pensions	70	SG12	2
Glen Whiston	Whiston Wealth Management	18	SG12	1
Scott Atkinson	GPFM*	158	SG13	3
Simon Frost	GPFM*	74	SG13	3
Emma Saunders	GPFM*	60	SG13	3
Natasha Brown	GWB Financial Services	11	SG13	1
Jenny Jackson	Premier Plus	131	SG18	7+
Charlotte Gibbon	Independent Personal Financial Management	111	SG18	5
Sam Worthington	Worthington Financial Planning*	268	SG19	5
Susie Bewell	Raymond James, Hitchin	199	SG4	7+
Jonathan Smith	Smith and Wardle Financial Planning*	131	SG4	5
Ashley Townsend	Prosperity IFA	129	SG4	1
Faye Silver	Raymond James, Hitchin	121	SG4	5
Rory Joseph	JLM Wealth	111	SG4	1
Rory Albon	Albon Financial Planning	72	SG4	3
Rowan Hedley	The Private Office*	44	SG4	1
Christian Lloyd-Williams	Smith and Wardle Financial Planning*	41	SG4	2
Simon Jackson	Smith and Wardle Financial Planning*	37	SG4	2
Katharine Ross	Smith and Wardle Financial Planning*	21	SG4	1
Andy Edgar	JLM Wealth	19	SG4	1

Matthew Barnes	Barnes Robertson Financial Planning	54	SG6	5
Nicholas Frid	Attivo	36	SG8	2
Harj Gill	Sandringham Financial Partners*	84	SL1	5
Hassam Shaukat	Shaukat Wealth	15	SL1	1
Giles Warren	Giles Warren Financial*	145	SL4	6
Nicholas Hall	Bryant Hall Todd Wealth Management	141	SL4	3
Chris Dahl	Advies Private Clients	122	SL4	6
Charlie Bryant	Bryant Hall Todd Wealth Management	59	SL4	5
Ian Howe	Druthers Financial Planning*	40	SL4	1
David Crabbe	Quilter Financial Advisers	153	SL6	7+
Karan Chandraja	KC Wealth	137	SL6	1
James Knight	Knight Wealth Management	31	SL6	1
Christopher Breach	Amber River SFIA	20	SL6	2
Lorraine Sellwood	Eight Wealth Management	130	SL7	2
Matthew Cole	The Private Office*	113	SL7	5
Gareth Lewis	Vivid Financial Planning	71	SL7	5
Nigel Burgess	Wardour Investments*	100	SL9	2
Nimesh Nathwani	Wardour Investments*	58	SL9	1
Phil Adams	Wardour Investments*	49	SL9	2
Luke Hartley	Hartley Ross	36	SL9	3
Sarah Arora	Flying Colours Advice	12	SL9	1
Jamie Mallon	Eight Wealth Management	293	SO14	4
James Thompson	NorthStar Wealth Management*	246	SO14	7+
Andrew Brown	Eight Wealth Management	198	SO14	5
Dean Hunt	Eight Wealth Management	179	SO14	2
Lindsay Tucker	Eight Wealth Management	145	SO14	2
Angela James	Yolo Wealth Management	92	SO14	6
Henry Lovell	Eight Wealth Management	82	SO14	2
Justin Wade	Regis Bentley	84	SO16	2
Nadine Perry	Attivo	132	SO19	1
Nicola Orchard	Orchard Wealth	96	SO22	6
Victoria Toan	VJT Wealth Management	81	SO22	6
Daniel Whitton	Argentis	65	SO22	1
Tom Collins	TMC Financial Consultancy	30	SO22	2
Mark Stewart	MKC Wealth	25	SO22	1
Liam Clarke	Fintuity	18	SO22	1
Tiernan Simmons	Argentis	67	SO50	1
Sandy McPherson	Fidelius*	66	SO50	2
Chris Mills	Voyage Financial Planning	152	SO51	2
Shaun Ramazannezhad	McMillan Financial Advice	115	SO51	5
Scott Moody	Ascot Lloyd*	89	SO51	2
Abilash Padayattil	Blue Stone Financial	61	SO51	2
John Haley	Willow Financial Planning	68	S50	2
Darren Ford	Essex Financial Planners	27	S50	1

VOUCHEDFOR'S TOP RATED FINANCIAL ADVISERS

SOUTH WEST ENGLAND					
NAME	FIRM	REVIEWS	LOCATION	YEARS QUALIFIED	
Andy Strange	Fidelius*	51	BA1	1	
Dane Kerkin	Fidelius*	47	BA1	2	
Paul Barker	Fidelius*	38	BA1	1	
Rupert Barlow	Barlow and Bartlett Wealth Management	29	BA1	1	
Max Pieters	Westminster Wealth Management*	63	BA11	3	
Gavin Park	Premier Financial Planning	154	BA12	7+	
Jeremy Coltman	Jeremy Coltman Wealth Management	101	BA12	4	
Daphne Ashford-Smith	Peter Harding Wealth Management	28	BA12	1	
Dan Alder	The Private Office*	56	BA15	3	
Sam Thorne	Northseam	153	BA20	7+	
Simon Dawes	Cooper Associates Wealth Management	96	BA20	2	
David Savage	True Potential	66	BA20	2	
Nathan Steele	Heritage & Co UK	236	BA3	6	
Tony Davies	FIRST Financial Services	272	BH1	4	
Matthew Dudley	Pocock Sanders	212	BH1	5	
Matthew Winchester	Pocock Sanders	201	BH1	1	
Mark Clinton	Clinton Kennard Associates	160	BH1	5	
Jared Brooks	Argentis	64	BH1	2	
Marta Daniel	Argentis	53	BH1	2	
James Suttie	Peter Harding Wealth Management	47	BH1	4	
Arron Clements	Argentis	44	BH1	2	
Robbie Holman	Peter Harding Wealth Management	39	BH1	3	
Mark Freeman	Argentis	29	BH1	1	
Richard French	Five Talents Financial Planning	11	BH1	1	
Emily Turgoose	Life Matters Financial Planning	68	BH14	2	
Andy Parsons	Eight Wealth Management	121	BH15	4	
Iain Murray	True Potential	102	BH15	7+	
Andrew Milligan	Forvis Mazars*	77	BH15	1	
David Sheppard	Eight Wealth Management	96	BH18	2	
Allan Cruse	Strategic Solutions Financial Services	158	BH20	7+	
Jason Lewis	Lewis Financial	73	BH20	1	
Ian Sparks	Sparks & Co Financial Services	289	BH21	7+	
Bodie Dove	Lester Brunt Wealth Management	90	BH21	4	
Amy Sparks	Sparks & Co Financial Services	19	BH21	1	
Jonathan Kavanagh	Ascot Lloyd*	84	BH22	2	
Karl Ward	True Potential	71	BH22	4	
Barbara Smith-Galer	Argentis	65	BH22	2	
Christine Jarvis	Eight Wealth Management	108	BH23	2	
Damon Goodey	2plan Wealth Management	61	BH23	1	
Stewart Sims-Handcock	Lonsdale Wealth Management	97	BH24	5	
Matthew Gibbons	St. James's Place	34	BH25	1	
Tristan Borkowski	TAB Financial Planning	28	BH25	1	
Chris Bibb	Chris Bibb IFA	85	BH4	5	
Daniel Blandford	The Private Office*	252	BS1	6	
Matthew Rich	Argentis	143	BS1	2	
Jamie Jacobs	Ifamax Wealth Management	140	BS1	5	
Anil Badhan	Assured Wealth Management	97	BS1	5	
Tom Buss	Finura Partners	86	BS1	2	
George Cooksley	Argentis	85	BS1	6	
Adrian Kidd	Ovation Finance*	81	BS1	1	
Michael Blair	Hartsfield	80	BS1	6	
Steve Pine	The Aspire Partnership	80	BS1	3	
Ken Hall	The Aspire Partnership	78	BS1	3	
Naomi Keith	The Aspire Partnership	72	BS1	3	
Adrian Wilkins	Aevum Wealth Management*	61	BS1	2	
Ben Sloggett	Intelligent Pensions	56	BS1	2	
Ian Larthe de Langladure	The Aspire Partnership	51	BS1	3	
Tom Morris	Ovation Finance*	47	BS1	1	
Melanie Dolphin	Hartsfield	44	BS1	3	

Damien Hopkins	OPW Chartered Financial Planners	41	BS1	3	
Tori Passmore	OPW Chartered Financial Planners	39	BS1	3	
Paul McMullan	Succession Wealth	34	BS1	3	
Tom Foley	Cooper Associates Wealth Management	20	BS1	1	
Joe Tucci	Cooper Associates Wealth Management	19	BS1	1	
Tom Brown	Bybrook Wealth Management	15	BS1	1	
Jin Hira	Succession Wealth	12	BS1	1	
Kimberley Sare	Guided Financial	12	BS1	1	
Elliott Rice	Succession Wealth	11	BS1	1	
Rich Powell	Powell & Associates Financial Planning	79	BS20	3	
Alex Alton	Alton Wealth Management	74	BS20	4	
Tom Britton	Ballantine Wealth Management	89	BS21	4	
James Cridland	Coleridge Wealth Management	49	BS21	4	
Greg Charlton	True Potential	217	BS23	5	
Weyshen Chiang	Aureus Wealth Management	80	BS23	3	
Andrew Finn	Just Wealth	24	BS3	1	
Tim Gallego	Poundbury Wealth Management	86	DT1	4	
David Boyce	Bright Future Financial	84	DT7	7+	
James Craw	True Potential	75	DT9	6	
James Dalglish	Premier Financial Planning	120	EX1	7+	
Craig Walker	Westminster Wealth Management*	96	EX1	2	
Chloe Illman	Lifetime IFA	81	EX1	4	
Martin Waistell	Strategic Solutions Financial Services	75	EX1	1	
Tasha Pullen	Hamilton Pullen Financial Planning	68	EX1	2	
Robyn Caffell	Intelligent Pensions	66	EX1	2	
Vasilis Panteli	Succession Wealth	58	EX1	5	
Anna Gidman	Anna Gidman Wealth	27	EX1	1	
Mark Welsh	Prydis Wealth	20	EX1	2	
Alex Pearce	RBC Brewin Dolphin	18	EX1	2	
Edward Stockwell	True Potential	26	EX12	2	
Andy Pearce	Duchy IFA	158	EX31	7+	
Stuart Brewer	AFH Wealth Management	68	EX31	1	
Adam Neal	Advice Rooms	40	EX31	2	
Luke Hill	Probert Financial	51	EX7	2	
Barry Martin	IBM Wealth Management	88	EX8	5	
Adam Field	William Highbourne Wealth Management	71	EX8	1	
Pieter Burger	William Highbourne Wealth Management	39	EX8	1	
Martyn Norris	Fidelius*	106	GL1	2	
Akbar Patel	BBT Group	100	GL1	1	
Ian Croxall	Fidelius*	93	GL1	2	
Daniel Morris	Prosser Knowles Associates	71	GL1	2	
Duncan Smitton	Smitton Wealth Solutions	57	GL1	5	
Jade Soutter-Davies	AFH Wealth Management	39	GL17	3	
Jonathan Bissett	Prosser Knowles Associates	46	GL20	2	
Rich Atkins	Theocsbury Financial	32	GL20	1	
Samuel Dearnley	Iona Beesly Associates	112	GL3	5	
Marcus Dunk	Price Financial Planning	10	GL5	1	
Mark Manning	Safehands IFA	165	GL50	2	
Robin Etherington	Amber River HDA	162	GL50	2	
Ben Burgess	Cheltenham IFA*	146	GL50	2	
Madeleine Hollands	Cheltenham IFA*	125	GL50	5	
Tara Wood	Cheltenham IFA*	92	GL50	1	
Andrew Mansion	Cheltenham IFA*	76	GL50	1	
Ben Sheward	Attivo	58	GL50	2	
Ben Parker	Parker Financial Advice	55	GL50	2	
Ryan Wright	Attivo	54	GL50	2	
Lee Grimshaw	Fidelius*	52	GL50	2	
Jack Manser	Attivo	51	GL50	2	
Nicholas Evans	Attivo	50	GL50	2	
Rob Tiffin	Altior Asset Management	47	GL50	2	
Daniel Ames	Amber River HDA	43	GL50	2	
Stuart Hutton	William Highbourne Wealth Management	42	GL50	1	
Vanessa Coates	Prosser Knowles Associates	31	GL50	1	

Bradley Laborero	Attivo	27	GL50	1	
Matthew Kirkham	William Highbourne Wealth Management	26	GL53	1	
Huw Jones	Proposito Financial Planning	32	GL7	2	
Anne Hester	Philip James IFA*	64	GL8	4	
Andy Harris	AFH Wealth Management Cookham	19	GL8	2	
Megan Sutton	Clarity Wealth Management	57	PL1	2	
Andy Burton	TFA - Trusted Financial Advice	55	PL1	5	
Martyn Burgess	Coast Financial	22	PL1	1	
Richard Bateman	Bateman Financial Management	115	PL14	5	
Paul Chidley	Kernow Financial Planning	75	PL15	2	
Peter Dart	Dart Wealth Management	41	PL15	3	
Jack Basford	InTime Financial Planning	12	PL15	1	
Mike LeGassick	Manning and Company	235	PL21	7+	
David Ellicott	Strategy Wealth UK	32	PL25	1	
Ross Clifford	Clifford Wealth Management	187	SN1	3	
Dave Southby	Dave Southby Financial Planning	36	SN1	3	
Phillip Kerley	Hawkeye Financial	32	SN1	1	
Stephen Dixon	AFH Wealth Management	32	SN1	3	
Matthew Dixon	Hartsfield	152	SN13	3	
John White	Hartsfield	87	SN13	4	
Josh Farmer	Cross Border Financial Planning	56	SN15	3	
Jonathan Hull	Eleven Six Financial Planning	38	SN15	3	
Charles Homer	Cross Border Financial Planning	21	SN15	1	
Philip Teague	Cross Border Financial Planning	16	SN15	1	
Mark Norton	Peter Harding Wealth Management	23	SN16	1	
Jim Knights	Perspective	45	SN8	1	
Ross Perry	Perspective	40	SN8	1	
William Stagg	True Potential	100	SP1	4	
Callum Warner	Argentis	75	SP1	2	
Kate Davis	Kingsmead Wealth	169	SP10	7+	
Mark Bastable	Templegate Financial Planning	164	SP10	2	
Richard Walker-Gunns	Orbit Financial Planning	30	SP4	1	
Richard Odell	Premier Financial Planning	98	SP7	6	
Peter Harding	Peter Harding Wealth Management	86	SP7	6	
Simon Cutler	Blackdown Financial	214	TA1	7+	
Jack Cooper	Cooper Associates Wealth Management	197	TA1	2	
Merryn Collins	Premier Financial Planning	120	TA1	2	
Jason Challis	Cooper Associates Wealth Management	99	TA1	2	
Christo Nation	Cooper Associates Wealth Management	80	TA1	2	
Kate Ward	Cooper Associates Wealth Management	66	TA1	2	
Richard Davies	Peter Harding Wealth Management	65	TA1	2	
Tim Groenewald	Cooper Associates Wealth Management	64	TA1	2	
Neil Rossiter	Blackdown Financial	50	TA1	1	
Jamie Wheeler	Cooper Associates Wealth Management	37	TA1	2	
Craig Viljoen	Cooper Associates Wealth Management	14	TA1	1	
Joseph Stephenson	Ballantine Wealth Management	96	TA18	3	
Matthew Colman	Fidelius*	20	TA21	1	
Stuart Rossiter	Rossiter Wealth Management	65	TA6	1	
Alex Turco	Positive Wealth Creation*	156	TA8	3	
Stephen Elvin	Stephen Elvin Wealth Management	116	TA8	7+	
Stephen Wales (Ripley Wales)	Ripley Wales Financial Planning	107	TQ1	6	
Steven Cliff	Sandringham Financial Partners*	80	TQ1	6	
Abigail Stidworthy	Strategic Solutions Financial Services	125	TQ12	1	
Vanessa Taylor	Strategic Solutions Financial Services	80	TQ12	1	
Paul Drake	Opal Financial Management	48	TQ12	1	
Craig Gahagan	Molyneux Associates	23	TQ12	1	
Karl Lehmann	Lehmann Financial Management	75	TQ14	1	
Louise Worden	Concise Wealth Management	36	TQ3	1	
Karen Cooper	Chadwick Financial Management	146	TQ6	7+	
Callum Pye	Chadwick Financial Management	47	TQ6	2	
Charlie Brown	South Devon Financial Planning	91	TQ7	4	
Jason Mountjoy	Clarity Wealth Management	124	TQ9	7+	
Owen Williams	Clarity Wealth Management	16	TQ9	1	

Darren Bilkey	TFA - Trusted Financial Advice	175	TR1	7+	
Jeremy Squibb	Saulsbury Independent Financial Planning	81	TR1	1	
David Medland	2plan Wealth Management	107	TR11	5	
Paul Grey	TFA - Trusted Financial Advice	304	TR15	7+	
Liam Thomas	TFA - Trusted Financial Advice	88	TR15	1	
James Saulsbury	Saulsbury Independent Financial Planning	117	TR6	7+	
Mark Ridgment	Cornwall Finance & Investment Services	92	TR7	2	
Will Clarke	Towan IFA	87	TR7	5	
James Williamson	Cornwall Finance & Investment Services	18	TR7	1	

WALES

James Gill	Abacus Associates	238	CF10	5	CF10	5
Daniel Ross	Hartley Ross	113	CF10	7+	CF10	7+
Tom Palmer	NTM Financial Services	106	CF10	1	CF10	1
Tom Waldoock	Attivo	73	CF10	2	CF10	2
Sam Ormond	Fidelius*	72	CF10	2	CF10	2
Minaz Kasmani	Life & Legacy Wealth Management	69	CF10	4	CF10	4
Ed Peach	Niche Private Clients	64	CF10	5	CF10	5
Andrew Goman	Hartley Ross	53	CF10	3	CF10	3
Sam Parry	Attivo	46	CF10	1	CF10	1
Nicholas Hill	NTM Financial Services	40	CF10	1	CF10	1
Suzanne Ward	Bloom Financial Planning	38	CF10	3	CF10	3
Grant Sheppard	Attivo	25	CF10	1	CF10	1
Dinesh Bharwani	Wealth Genius	80	CF14	4	CF14	4
David Reid	DL Reid Wealth & Finance	30	CF14	1	CF14	1
Andrew Varley	Andrew Varley Financial Planning	49	CF23	4	CF23	4
Stephen Davies	Diligent Wealth Planning	158	CF37	1	CF37	1
Ian Campbell	Ian D Campbell IFS	114	CF37	5	CF37	5

VOUCHEDFOR'S TOP RATED FINANCIAL ADVISERS

Brooke Cameron-James	Abacus Associates	53	CF39	3	CF39	3
Gareth Channon	GCFC	62	CF47	5	CF47	5
Kate Shaw	Financial Life Planning	19	CF5	1	CF5	1
Scott Reynolds	Summit Financial Advisors	12	CF62	1	CF62	1
Marcus Rees	Romily Financial*	170	CF64	3	CF64	3
David Stealey	Romily Financial*	136	CF64	2	CF64	2
Owen Morgan	Romily Financial*	23	CF64	1	CF64	1
Tony Thomas	TT Wealth	194	CF72	7+	CF72	7+
Melanie Scott	MJS Financial Services	77	CF72	3	CF72	3
Chris Woods	EST Wealth	26	CF72	1	CF72	1
Josie Herdman	How Money Matters*	58	LD2	2	LD2	2
Tom Parmiter	Harken Financial	80	LL11	5	LL11	5
Gerry Cummins	Cummins Financial Advisers	59	LL11	1	LL11	1
Dan Tudor-Owen	Chester Financial Wealth Management	35	LL11	3	LL11	3
Paul Williams	Commodore Finance	250	LL19	6	LL19	6
Paul Boulton	Boulton Financial Services	198	LL31	4	LL31	4
Connor Mason	Fearndale Wealth Management	16	LL57	1	LL57	1
Mark Redman	Perspective	31	NP10	1	NP10	1
Andy Parry	IWM Wealth Management	84	NP12	4	NP12	4
Lewis Parry	IWM Wealth Management	65	NP12	4	NP12	4
Rachel Barnby	RWG Financial Planning	20	NP16	2	NP16	2
Kelly East	Pure Wealth Management	171	NP20	7+	NP20	7+
Lewys Richards	Vital Financial Planning*	150	NP20	5	NP20	5
Alistair Cummings	Rogerstone IFA*	124	NP20	3	NP20	3
Alex Palmer	Beesure	118	NP20	1	NP20	1
Simon Trainor	Ascent Wealth Management	78	NP20	2	NP20	2
Ryan Caisley	Niche Private Clients	75	NP20	4	NP20	4
James Hawkins	Isca Wealth Management	69	NP20	6	NP20	6

KEY

FIRM - * Top Rated Firm (inc's trading names of Top Rated Firms), see p19

YEARS QUALIFIED - Consecutive years as a Top Rated Adviser

VOUCHEDFOR'S TOP RATED MORTGAGE ADVISERS

Mark Mackin	Monument Financial Solutions	75	NG31	2
Billy Dexter	Hoyl Independent Advisers	19	NG31	1
Nick Spoltton	Spoltton Mortgages	334	NG34	6
Christopher Taylor	Four-Nations Mortgages	192	NG34	7+
Marzena Zenczakowska	Grand Union Financial	79	NN1	1
Narcisz Sweeney	The Mortgage Compass	22	NN17	1
Ian Butcher	Anytime Mortgages	140	NN8	6
Karl Lawton	GHL Direct	871	ST1	7+
Carl Elsby	Elsby Associates	140	ST1	2
James Myatt	Embrace Financial Services	117	ST11	3
Pam Stockdale	Zeal Mortgages & Protection Services	247	ST14	7+
Jane Jackson	Jane Jackson Financial Solutions	50	ST15	2
Lisa Jackson	Integrity Mortgage Solutions	207	ST17	7+
Steven Lyons	The Mortgage Pride	146	ST2	7+
Eldho Paul	Just Mortgages	56	ST5	2
Mark Valentine	MV Mortgage	138	SY1	5
Will Mason	Masons IFA	92	SY1	1
Pauline Johnson	All Kinds of Mortgages	16	SY15	1
Tandi Fellows	Probit Mortgage Services	209	TF1	7+
Nigel Morray	Robert Nicholas Financial Advisers	35	TF1	1
Leanne Charnley	C D Financial	17	TF11	1
Joe Tumelty	Kind Wealth	16	WR1	1
Jill Stanley	GHL Direct	127	WR10	4
Jo Mezzone	Whiteoak Mortgages	107	WR9	6
Steve Mezzone	Whiteoak Mortgages	66	WR9	6
Ellis Turner	Jane Newman Financial Planning	23	WR9	2
Sally Evans	Integrity Mortgage Solutions	59	WV1	4

VOUCHEDFOR'S TOP RATED MORTGAGE ADVISERS

GREATER LONDON

NAME	FIRM	REVIEWS	LOCATION	YEARS QUALIFIED
Calum Lawson	Ablestoke	32	EC1M	2
Jamie Chapman	CMG Advisers	636	EC3V	7+
Nouran Moustafa	Kalon Financial	61	EC3V	1
Charles Chambers	Virtus Financial Planning	26	EC3V	2
Danish Kamran	Kings Group	164	EN1	4
Errol Hall	Mortgage Broker Services	106	EN8	2
Mitul Patel	Lemon Tree Financial*	212	HA1	2
Jiten Varsani	FortyOne Money	147	HA1	3
Abdul Karimjee	My Local Mortgage Advisor	87	HA1	5
Hamal Patel	Crystal Financial Solutions	25	HA1	1
Sapna Malde	KVM Mortgages UK	75	HA5	1
Robin Thomas	RS Financial	196	HA6	4
Sekkappan Alagu	Nachu Finance	209	HA7	7+
Michelle Ford	JML (Financial) Associates	146	KT11	6
Joshua Smith	Lindon-Travers Associates	82	KT11	2
Daniel Ford	JML (Financial) Associates	60	KT11	2
Chris Layzell	Bigmore Associates	109	KT12	6
Rachel Lummis	Xpress Mortgages	49	KT14	2
Carmen Green	Xpress Mortgages	42	KT14	2
Danielle Larrieu	King Property Finance	67	KT16	1
Josif Gatev	JVA Mortgages	74	KT4	4
Wilson F. da Silva	Nest Finance London	42	KT4	3
Kellye Pilgrim	Pilgrim Mortgages and Protection	27	KT8	1
Paul Collinson	Brick2Brick Mortgage Solutions	84	N1	4
Adam Jolles	Acacia	33	N3	1

Beulah Antonin	Charterhouse Mortgages & Protection	82	NW1	4
Roshan Vitharanage	BVS Mortgages & Financial Services	665	NW7	5
Sella De Silva	BVS Mortgages & Financial Services	124	NW7	2
Kishorlal Nakrani	Red Rock Mortgages	31	NW9	1
Dinesh De Silva	BVS Mortgages & Financial Services	19	NW9	1
Bradley Moore	Connect Mortgages	59	RM11	2
Kim Spires	Connect Mortgages	23	RM11	1
Niall Hebron	Connect Mortgages	18	RM12	1
Tony Silver	White House Mortgages	12	RM16	1
Shahinul Islam	Simply Mortgages	111	RM7	2
Charlie Wade	Wade Wealth Partners	424	SE1	7+
Jess Daniels	Wade Wealth Partners	18	SE1	1
Jo Jingree	Mortgage Confidence	144	SE20	7+
Vincent Corcoran	Gordon Blair Financial Services	326	SM4	6
Warren Pesch	Mortgage Lolly	15	SW19	1
Helen Williams	SWFS	17	SW1X	1
Sonia Owen	Mortgage, Loan & Equity Release Shop	33	W1T	1
Jon-Joseph Coops	LJC Mortgages	59	W6	1
James Dennett	A S Financial	230	WC1R	4
Martin Seewoonarain	A S Financial	137	WC1R	3
Jim Brough	A S Financial	121	WC1R	4
Sarah Howard	A S Financial	102	WC1R	4
Asher Kenton	A S Financial	95	WC1R	4
Joshua Brown	Westminster Wealth Management*	67	WC1V	1
Matthew Fretwell	A S Financial	168	WC1X	3
Farhat Hanif	David James Wealth*	44	WC2B	2
Ellie Macdonald	S & J Mortgage Services	90	WD25	7+

NORTH ENGLAND

Emma Wood	Exclusive Mortgage Advice Services	45	BD20	3
Belinda Kemplay	Bee Mortgage Solutions	81	BD21	3
Sharif Muhashash	Green Door Mortgages	100	CH2	7+
Siobhan Martin	CH Mortgages NW	181	CH42	4
Dean Bedson	Bedson Financial Solutions	62	CW11	3
Amber Crosby-Craig	Mortgage Advice Bureau	304	CW12	5
Paul Kozyra	PK Finance	204	CW4	3
Christine Parkin	Durham Mortgage Solutions	306	DH1	7+
Michael Bond	Foster Denovo	36	DH1	2
Bob Riach	Riach Financial	417	DN15	7+
Cilla Shackleton	White Rose Finance	86	DN22	2
Matthew Penszor	White Rose Finance	58	DN39	1
Vinod Malayil	Vsure Financial	89	HD1	5
Naomi Robinson	Naomi Financial	177	HD3	2
Jen Knowlson	Property Link Homes	85	HG4	3
Trish Green	AFH Wealth Management	45	HU1	4
Ian Gartside	Just Mortgages	120	L1	5
Liam Coker	LTC Mortgages	389	L34	7+
Chris Melling	We Like Mortgages	39	L34	1
Simon Horsfall	Vista Financial Management	258	LS1	6
Andrew Quinn	Response Mortgage Services	208	LS1	5
Andrew Brierley	Right Mortgage	137	LS21	1
Richard Effio	Right Choice Mortgages	42	M27	1
Andy Jones	Irlam Estates Financial Services	105	M3	5
Matthew Jones	Stratton Wealth Management	38	M3	1
Ben Horsfield	Suttons Independent Financial Advisers*	282	M33	4
Jagadish Shanmugam	Dream Bricks Financial	77	M33	2
Matthew Moralee	First Mortgage	88	NE1	2

Dan and Lizzie McNulty (and their dog Thor) are preparing to upsize

MAKING SENSE OF MORTGAGES

From fixed and variable rates to income protection, there's a lot to understand. But with guidance from a trusted broker, getting on the property ladder can be made more accessible, as one couple discovered.

When Dan and Lizzie McNulty bought their first home in Bangor, Co Down, six years ago they turned to Navigate Mortgages director Paul Shannon to help them cut through the financial jargon and find the best deal.

“Buying a home is daunting – it’s not something they teach you in school

“As first-time buyers it was really quite daunting,” says Lizzie, 32, a hairdresser. “We didn’t know if we needed a fixed rate or a variable rate – it’s not something they teach you in school. Our broker, Paul, really helped us to understand it all.”

Dan, 33, a software developer, says: “Paul got us access to cheaper mortgage rates and he also chatted to us about life insurance and other types of protection.”

It was thanks to Paul’s advice that the couple took out income protection to cover their earnings if one of them was unable to work. This proved vital in covering the mortgage and other bills when Lizzie broke a finger and was unable to work as a hairdresser for six weeks. “I’ve since encouraged all my colleagues at the salon to get income protection,” she says.

But a lot has changed since the couple first got on to the housing ladder with Paul’s help. Dan and Lizzie are now married with a one- year-old daughter, Willow, and are about to move up the ladder to a bigger home in the coming weeks.

“Paul helped us to get a larger mortgage so that we could upsize to a place with more space for Willow to run around,” Lizzie says. “We loved our first home and it was a stepping stone, but eventually you just grow out of a house and need a wee bit more family space.

“The new house has got a spare room and bigger garden for Willow to play in,” she says. “And it’s slightly closer to the school that we are hoping she will get

into, and to her grandparents’ house.”

Lizzie adds: “Because I’m self-employed, you have to jump through a couple more hoops, especially because I had been off for nearly a year on maternity leave. Paul knew which lenders were going to look most favourably on our situation and I think if it hadn’t been for all the work he did in the background we might not have been able to get the house we wanted.”



VOUCHEDFOR'S TOP RATED MORTGAGE ADVISERS

Daniel Hindmarsh	Muvin	141	NE28	4
David Glass	Newcastle Financial Advisers*	18	NE28	1
Adele Archer	Admarsh Mortgages	18	PR1	1
Rachel Ramsay	Ramsay Financial	78	PR6	2
Hannah Worthington	Worthy Mortgages	70	PR6	4
Ian Christlo	MortgageLine Services	211	S1	7+
Keegan Grippo	Fidelius*	51	S40	2
Abigail Denman	Rosewood Wealth Management*	17	S40	1
Brian Beech	Futures Assured	283	S9	7+
Ben Shirliff	Banks Lane Finance	200	SK1	2
Lyndsay Fairhurst	Midavlyn Mortgages	222	SK13	7+
Sarah Ward-Novak	Identity Financial Solutions	72	SK9	4
Keeley Macaulay	Mortgage 1st	155	TS20	5
Steven Thomas	Just Mortgages	232	WA1	7+
Ravinda Ranchagodge Don	BVS Mortgages & Financial Services	106	WA10	2
Stefan Stimpson	Bespoke Mortgage Solutions	312	WA14	7+
James Foster	JF Financial Solutions	173	WA14	7+
Gerard Potts	Elite Financial Planning Consultants	119	WA14	5
Carol Smith	Carol Smith Mortgage Services	119	WA7	6
Chris Law	Chris Law Mortgages	237	WF4	6
Adele Forbes	West Yorkshire Money	134	WF8	6
Emma Hutchinson	West Yorkshire Money	111	WF8	6
Tanya Cilia	Mortgages Explained	109	WN1	7+
Stephen Byfield	Just Mortgages	50	WN1	1

NORTHERN IRELAND

Laura Lewis	The Mortgage Clinic	198	BT1	3
Filip Klimek	The Mortgage Clinic	31	BT1	1
Kamil Mularczyk	Pro Financial Group	121	BT34	4
Helmut Elstner	The Mortgage Clinic	207	BT4	2
Caolan Coyle	The Mortgage Clinic	85	BT71	5
Sheena Campbell	Campbell Financial	192	S6	5

SCOTLAND

Andrew Steinbach	JLM Mortgage Services	45	AB10	1
Ian Coffey	JLM Mortgage Services	22	AB32	1
Anthony Wilson	Exchange Mortgages	136	EH1	5
Bede Pratt	Your Mortgage Broker	109	EH1	7+
Will Townsend	Mortgage Force	93	EH1	1
Rhys Forrest	Forrest & Co. Mortgages & Protection	48	EH33	2
Graham J McComb	Money Advice & Planning	116	EH54	7+
Alasdair Devine	Property Investment Finance	143	FH8	7+
Beth Stevenson	The Glasgow Mortgage Company	345	G1	7+
Ross McMillan	Blue Fish Mortgage Solutions	163	G1	4
Aaron Reilly	Stockingbridge	55	G1	1
Christine Paton	Christine Paton Mortgage Solutions	38	G1	1
Emma Baird	Amber River C&M	101	IV31	3
Michael Hughes	Mortgage Advice Partnership	82	ML3	2
James Brown	James Alexander Brown	55	ML3	2
Deborah Willoughby	James Alexander Brown	33	ML3	2
Scott Wyllie	Money Advice & Planning	19	PA4	1

SOUTH EAST ENGLAND

Liam Warrilow	Alban Financial Services	63	AL5	1
Oliver Bailey	Just Mortgages	46	AL7	1
Colin Warburton	The Finance House	60	BN1	1
Maria Atherden	Complete Financial Planning	286	BN21	6
Elliot Beesley	Upperton Advice	13	BN21	1
Kevin Hampton	Hampton Home Finance	22	BN26	1
James Wingate	James Wingate	145	BN43	6
Jack Neale	MyMny	89	CT1	1
Lewis Chapman	Mortgage Services 4u	328	CT11	7+
Darren Cronin	Kent Financial Consultants	34	CT13	1

Siobhan Heard	Keevelia Mortgage Solutions	66	CT16	3
Lisa Howes	Tipping and Webb	54	CT16	1
James McDermott	Mortgage Advice For Everyone	173	GU15	1
Sam McDermott	Mortgage Advice For Everyone	11	GU15	1
Graham Gibson	Fortis Financial Planning	206	GU2	5
Boban Sebastian	Sterling Street	144	GU21	5
Philip Henden	Henden Financial	177	GU51	6
Nadia Vorkhib	New World Finance	179	HP11	2
Angelo Burkey	BVS Mortgages & Financial Services	109	HP19	2
Jenny Whyte	Roseacre Mortgages	119	ME14	5
Tom Atley	MoneySprite	86	ME14	2
Andrew McCrossan	Equity Life UK	72	ME14	1
Sheena Young	Encore Mortgages	72	ME6	7+
Samantha Brittain	Odyssey Wealth Management	52	MK12	1
Michael Pitt	Just Mortgages	75	MK46	2
Wije Kanattege	BVS Mortgages & Financial Services	96	MK9	2
Bobbi White	Collective Financial Planning	35	MK9	3
Garvin Carley	The Residential Mortgage Hub	117	OX1	6
Shaun Nicholson	Nicholson Brown*	114	OX1	6
Alexander Peters-Bean	Ox and Hart Financial Services	77	OX1	6
James Best	Best Financial Planning	87	OX44	1
Matthew Lay	Compound Wealth Planning	26	PO1	2
Michelle Lawson	Lawson Financial	226	PO14	3
Debra Cornell	Just Mortgages Direct	95	PO14	2
Alan Finch	MortgagesToGo	28	PO36	1
Phil Randall	LRG Financial Services	64	RG1	4
Dominic Brierley	The Money Guardian	83	RG10	1
Carol Brown	First Choice Mortgage Company	375	RG14	7+
Michelle Sharpe	Pear Tree Mortgages	81	RG17	6
Lucy Watts	Heart and Home Mortgages	188	RH10	6
David Tickner	Knight Shaw Finance	130	RH13	5
Ashley Hollom	True Advice Financial Services	141	RH19	2
Zahaan Hussain	Smith and Wardle Financial Planning*	21	SG4	1
Peter Baldacchino	High Street Mortgages	103	SL1	7+
Chirag Patel	CKN Mortgages	115	SL4	5
Toby Wheeler	Custom Mortgages & Finance	70	SL4	2
Russell Tilbury	Savvy Mortgages	149	SL6	1
Sally Heath	Marlow Mortgage Co	45	SL7	2
Darryl Kiy	DK Financial Services	87	SO22	4
David Howlett	Knight Shaw Finance	93	SO43	4
Amy Edwards	Just Mortgages	28	SO53	1
Michael Nicholls	DFS Financial Services	72	SS1	4
Ijjo Joseph	Sterling Street	95	SS14	5
Jayne Gray	Topaz Financial Planning	82	SS17	1
Lahiri Hettiarachchi	BVS Mortgages & Financial Services	29	SS4	1
Richard Hellery	Mortgage Business Financial Advisers	152	SS5	6
Robert Freeman	Hitchell Financial Planning	81	TN1	4
Paul Steggle	Foxgrove Associates	138	TN13	7+
Ian Butt	Prospect Tree Mortgages	200	TN23	7+
Joanne Osborne	Scarlett Financial Services	176	TN23	7+
Lukasz Zurek	Confidence In Finance	125	TN38	1
Philip Ball	Omni Finance	24	TN39	1
Dave Ellis	Fresh Financial Services	126	TN40	2
Cynthia Cary	CC Mortgage Services*	111	TN7	2

SOUTH WEST ENGLAND

Robert Wilson	Top Dog Mortgage Company	23	BA1	1
Conner Mckay	Heritage & Co UK	151	BA14	2
Michaela Cooch	Mortgage Saving Expert	107	BA14	6
Dan McCarthy	GHL Direct	161	BA3	5
James Lewis	PFM Associates	41	BH15	2
James Coghlan	Ellis James Financial	187	BS1	5
Adam Wells	Bristol Rose Mortgages	176	BS1	6

Paul Waterfall	WR Ethical	137	BS1	4
Martin Strong	Strong Mortgage Solutions	79	BS1	2
Ashley Knight	WR Ethical	66	BS1	2
Tom Gledhill	Retirement Solutions	60	BS1	1
Catherine Collar	Collar Mortgage Services	64	BS23	5
James Thorne	Premier Financial Planning	121	DT11	7+
Sam Hyslop	NxtGen Mortgages	162	EX1	5
Linda Cleaves	Thompson Jenner Financial Services	26	EX1	1
Russell Birtles	View Finance	170	EX23	5
Joy Harrison	Hoskin Financial Planning	15	EX31	1
Joshua Abbott	NxtGen Mortgages	40	EX7	1
Jason Whitehead	Vitality Mortgages	187	GL15	7+
Mark Walker	B Mortgage Services	160	GL50	4
Oliver McGeown	Cooper Associates Mortgages	100	GL50	4
Kirsty Dudek	Lavender Mortgages	55	GL50	2
Greg West	Your Ideal Mortgage	372	PL14	7+
Barrie Evans	Your Ideal Mortgage	148	PL14	5
Gemma Collins	Your Ideal Mortgage	44	PL14	2
Thomas Glendinning	Kernow Financial Planning	80	PL15	2
Douglas Honey	Kernow Financial Planning	48	PL15	2
Kerry Woodcock	Horizon Mortgages and Protection	60	PL24	5
Darren Spragg	Legacy Financial Services	86	PL31	1
Gary Price	Gary Price Mortgages	127	SN1	6
Sian Hewson	Future Planning Mortgages	115	SN1	6
Miles Robinson	Home Group Financial	62	SN13	2
Adam Nanson	Your Mortgage Expert	103	SP1	1
Daniel White	White Financial Services	227	TA1	7+
Emma Hamilton	Blackdown Financial	95	TA1	4
Julie Callun	Cooper Associates Mortgages	49	TA1	3
Terri Hodge	Cooper Associates Mortgages	46	TA1	2
Graham Davidson	Cooper Associates Mortgages	41	TA1	2
John Harris	Cooper Associates Mortgages	41	TA1	2
Paul Bruford	Cooper Associates Mortgages	41	TA1	2
Will Newnes	Cooper Associates Mortgages	40	TA1	2
Carla Wells-Burr	Cooper Associates Mortgages	39	TA1	2
Oliver Strong	Cooper Associates Mortgages	32	TA1	2
James Regan	Cooper Associates Wealth Management	13	TA1	1
Darren Crocker	International Property Finance	80	TA14	4
Mark Davis	XL Financial Services	320	TA6	7+
Samuel Whittlesea	Whittlesea Mortgages	250	TA6	7+
Lisa Haines-Owen	Mermaid Mortgages	34	TQ3	1
Samuel Miller	Pia Financial Solutions	83	TQ9	2
Simon Muirhead	Premier Financial Planning	93	TR9	6
Adam Trehwella	Simon Karande	15	TR9	1

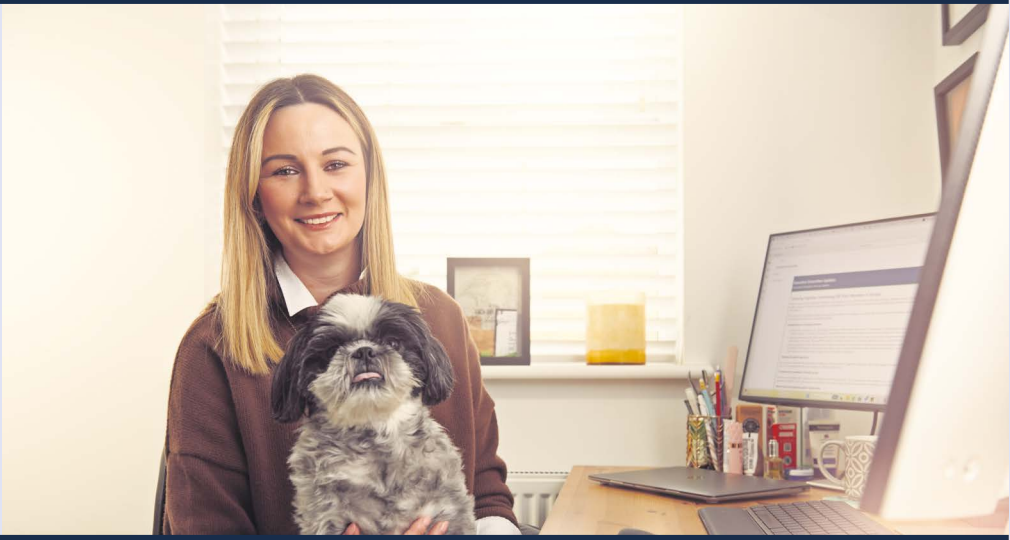
WALES

Lisa Fletcher	BPR Protect	270	CF10	6
Liam Schewitz	Cornerstone Finance Group	81	CF10	4

VOUCHEDFOR'S TOP RATED PROTECTION ADVISERS						
CENTRAL ENGLAND						
NAME	FIRM	REVIEWS	LOCATION	YEARS QUALIFIED		
Daniel Jones	The Mortgage World	56	B46	1		
Sergiu Albeanu	Owl Financial	22	B77	1		
Pirasath Kanesiah	Owl Financial	83	CV1	1		
Maria (Paz) Bermudez	Owl Financial	56	CV21	1		
Maríel Gonzales	Owl Financial	32	CV21	1		
Salga Peter	Owl Financial	50	DE1	1		
Vasile Bec	Owl Financial	38	NN1	1		
Shine Puttumannil	Owl Financial	12	NN1	1		
Sivasenthuran Rasaiya	Owl Financial	167	NN17	5		
Felben Pujanes	Lilac Financial	98	NN17	5		
Mihai Nechifor	Owl Financial	143	WR10	1		
EAST ENGLAND						
Jennifer Arguelles	Owl Financial	78	CM18	3		
Helen Colbrook	Hoyl Independent Advisers	18	NR27	1		
G. Thengumtharayil	Owl Financial	33	South Croydon	2		
I. Linel Senerpida	Owl Financial	23	Turnham Green	2		
GREATER LONDON						
George Thengumtharayil	Owl Financial	51	CR2	3		
Evangelina Wilson	Owl Financial	23	E8	1		
Martyn Ruckley	Fortura Financial Partners	22	EC3V	1		
Edward Adu-Boahen	Owl Financial	111	EN11	3		
Ben Burgess	LifeSearch	73	N1	1		
Orianne Williamson	LifeSearch	70	N1	1		
Jack Hare	LifeSearch	56	N1	2		
Lewis King	LifeSearch	55	N1	1		
Billy Drayan	LifeSearch	39	N1	1		
Ryan Robson	LifeSearch	34	N1	1		
Joe Dunn	LifeSearch	29	N1	1		
Kavita Kang	LifeSearch	23	N1	1		
Tobi Adedulu	LifeSearch	16	N1	1		
Joshua Ellis	LifeSearch	13	N1	1		
Aleksandar Kasabov	Kalon Financial	138	SW3	1		
NORTH ENGLAND						
Hayley Towlson	Armstrong Watson	39	CA1	2		
Alfredo Laurio	Supreme Financial Solutions	127	L36	5		
Charles Parker-Smith	LifeSearch	330	LS1	3		
Fenn Settle	LifeSearch	136	LS1	2		
Firas Khan	LifeSearch	60	LS1	1		
Lewis Gill	LifeSearch	55	LS1	1		
Faith Conroy	LifeSearch	51	LS1	1		
Barbara Stanley	LifeSearch	49	LS1	1		
Mohammed Ali	LifeSearch	49	LS1	1		
Chris Banks	LifeSearch	46	LS1	1		
Qulzam Qader	LifeSearch	45	LS1	2		
Sam Emery	LifeSearch	44	LS1	1		
Matthew Lee	LifeSearch	42	LS1	1		
Daniel Vieira	LifeSearch	39	LS1	1		
Jack Magee	LifeSearch	36	LS1	1		
James Masterson	LifeSearch	35	LS1	1		
Justine Shaw	LifeSearch	34	LS1	1		
Sarah Lockwood	LifeSearch	34	LS1	2		
Dylan Stranney	LifeSearch	31	LS1	1		
Daniel Benson	LifeSearch	29	LS1	1		
Olivia Brill	LifeSearch	29	LS1	1		
Edward Knowles	LifeSearch	28	LS1	1		
Joe Hemingway	LifeSearch	27	LS1	1		
Gareth Owens	LifeSearch	26	LS1	1		
Luke Cook	LifeSearch	26	LS1	1		
Luke Stephenson	LifeSearch	26	LS1	1		
Luke Seisay	LifeSearch	23	LS1	1		
Emeric Pickard	LifeSearch	22	LS1	1		
Garry Lennon	LifeSearch	22	LS1	1		
John Calvert	LifeSearch	22	LS1	1		
Steven Robb	LifeSearch	22	LS1	1		
Adam Battensby	LifeSearch	19	LS1	1		
Liam Rowland	LifeSearch	19	LS1	1		
Nathan Dewhirst	LifeSearch	18	LS1	1		
Reece Stranney	LifeSearch	18	LS1	1		
Ahsan Khan	LifeSearch	17	LS1	1		
Steven Waite	LifeSearch	15	LS1	1		
Matt Suddards	LifeSearch	14	LS1	1		
Mohammad Imran Ali	LifeSearch	14	LS1	1		
Neal Glover	LifeSearch	13	LS1	1		
Caroline Henningsson	LifeSearch	12	LS1	1		
Jiby Jose	Owl Financial	19	NE5	1		
Tom Needham	LifeSearch	41	S40	2		
Siju Raju Varghese	Owl Financial	35	WF1	1		
NORTHERN IRELAND						
Danuta-Dorota Konieczna	Owl Financial	132	BT1	4		
SOUTH EAST ENGLAND						
Catherine Roberts	The Right Broker	96	GU16	3		
Veerah Sswamy	Lilac Financial	287	LU1	5		
Mahesh Chandrarathna	Owl Financial	237	ME14	5		
Godwin Bassey	Owl Financial	83	ME14	4		
Dinendra Senavirathna	Owl Financial	26	ME14	1		
Kandeepan Shanmuganathan	Lilac Financial	178	MK40	5		
Tom Filipczak	LifeSearch	74	MK40	2		
Ben Fearon	LifeSearch	50	MK40	2		
Matt Clifford	LifeSearch	35	MK40	2		
Matthew Moore	LifeSearch	170	MK9	3		
Daniel Kellegher	LifeSearch	97	MK9	1		
Gemma Lawrence	LifeSearch	90	MK9	2		
John Hurd	LifeSearch	87	MK9	3		
Alex Craven	LifeSearch	85	MK9	1		
Anthony Andreoli	LifeSearch	81	MK9	2		
Duncan Nash	LifeSearch	73	MK9	1		
Mark Ashworth	LifeSearch	64	MK9	1		
David Deacon	LifeSearch	57	MK9	1		
Jamal Benhaddou	LifeSearch	52	MK9	1		
Sajan Khinda	LifeSearch	52	MK9	1		
Shaun Adegbaju	LifeSearch	51	MK9	2		
Tawanda Nyambo	LifeSearch	50	MK9	1		
Chelsea White	LifeSearch	46	MK9	1		
Laura Haynes	LifeSearch	45	MK9	1		
Roger King	LifeSearch	41	MK9	2		
John Hambridge	LifeSearch	38	MK9	1		
Aaron Heer	LifeSearch	36	MK9	1		
Ben Morley	LifeSearch	32	MK9	1		
Warren Lewis	LifeSearch	32	MK9	1		
Bryan Campbell	LifeSearch	27	MK9	1		
Jack Norman	LifeSearch	25	MK9	1		
Atdhe Berisha	LifeSearch	22	MK9	1		
Emily Hunt	LifeSearch	21	MK9	1		
Kiri Baskaran	LifeSearch	21	MK9	1		
Jaya Price	LifeSearch	20	MK9	1		
Karla Pollard	LifeSearch	19	MK9	1		
Kevin Parker	LifeSearch	16	MK9	1		
Howard Endersby	LifeSearch	15	MK9	1		
Nick Rixon	LifeSearch	11	MK9	1		
Godfrey Nii Buckle	Kalon Financial	13	SS14	1		
SOUTH WEST ENGLAND						
Shine Jose	Sterling Street	31	PL11	1		
Michael Mark Dalauidao	Owl Financial	80	SN1	2		
Arsie De Luna Gonzales	Owl Financial	65	SN1	1		
Doinel-Marinel Zmaranda	Owl Financial	12	SN5	1		
WALES						
Jordan Liddle	Vita	125	CF10	2		
Steve Pengelly	Vita	118	CF10	2		
Philip Roberts	Vita	112	CF10	2		
Corey Greenway	Vita	72	CF10	2		
Mina Kiaroodi	Owl Financial	25	CF10	2		
VOUCHEDFOR'S TOP RATED EQUITY RELEASE ADVISERS						
CENTRAL ENGLAND						
Prab Singh	55 Plus	64	B1	3		
Roy Tozer	Viva Retirement Solutions	22	CV7	1		
Daniel Sellwood	55Plus Equity Release	70	LE11	4		
David Grasham	Viva Retirement Solutions	84	LE12	5		
Meral Kendrick	Good Life Mortgage	76	LN1	4		
Robyn Moss	Aviva Equity Release Advice	44	NN15	2		
EAST ENGLAND						
Shaun Tillyer	Viva Retirement Solutions	64	CM1	5		
NORTH ENGLAND						
David Griffin	Release My Equity	82	BL2	4		
George Shaw Knowles	The Equity Release Experts	50	DN15	3		
Kerry Quirke	Viva Retirement Solutions	62	FY1	3		
Richard Lloyd	Aviva Equity Release Advice	47	FY8	2		
Sonya Shaw	Smart Choice Equity Release	17	HD3	1		
Catherine Evans	Aviva Equity Release Advice	50	L34	2		
Dawn Evans	Viva Retirement Solutions	131	LS1	5		
Christopher South	Laterliving now!	81	LS1	4		
Robert Walsh	Viva Retirement Solutions	105	M1	5		
Beverley Ager	Aviva Equity Release Advice	76	NE41	2		
David Cole	Viva Retirement Solutions	79	PR25	3		
Simon Chalk	Laterliving now!	159	S40	5		
Alison Walker	Aviva Equity Release Advice	66	SK15	2		
SCOTLAND						
Struan Mackenzie	Aviva Equity Release Advice	48	EH1	2		
Ken Cadman	The Equity Release Experts	44	G1	4		
SOUTH EAST ENGLAND						
Paul Saroya	Viva Retirement Solutions	84	AL1	5		
Gerard Hucker	Viva Retirement Solutions	52	GU7	4		
Russell Coneron	Viva Retirement Solutions	111	HP19	5		

Unfairly uninsured

How one woman overcame being denied cover because of her type 1 diabetes



After weeks of searching on price comparison websites and phoning insurers, Sophie Collins had almost given up hope of finding an income protection policy that would accept her.

The 36-year-old from Peterborough was diagnosed with type 1 diabetes as a child, which she manages well with no other complications. She wanted to take out income protection to help cover her mortgage and car finance if she were unable to work in the future due to illness.

Collins was conscious that she couldn't get cover for time off due to the diabetes itself as existing conditions are excluded. But she still wanted protection in the event of other health problems or injuries.

"It was soul-destroying because I'm in my thirties and probably fitter and healthier than many people who don't have diabetes," says Collins.

"But as soon as an insurer hears that you are diabetic they shut the door in your face. Because it's considered to be a high-risk condition and there is the potential for complications they don't want to touch it."

Collins spoke to one financial adviser who could not help her before she eventually found

assistance with a specialist firm, Lifesearch, which had lots of positive reviews online. There she spoke to protection adviser Matthew Moore and was relieved that he seemed to have an understanding of the condition.

Moore says: "Insurers are really fussy when it comes to income protection. It is the hardest type of cover to get because it is the one that people are most likely to claim on."

With critical illness cover, for example, you can only claim if you develop certain serious conditions, whereas income protection is more comprehensive and offers a regular income if your doctor decides that you are unable to work, he explains.

"But I was aware of one insurer that had recently started offering cover for people with diabetes – not for the diabetes itself, but if you are not able to work because of another illness." Moore went through all the health questionnaires with Collins and she didn't have to speak to the insurer directly. She says it was an enormous relief when she was finally accepted.

"Moore was brilliant and it was all set up really quickly. I'm paying around £30 a month, which is a reasonable premium – I expected it

"An enormous relief": Sophie Collins and Harvey

“When insurers hear you’re diabetic they shut the door in your face

to be much more. It has been a godsend.

"Being diabetic there is a lot to think about and this is one less worry. There is quite a large diabetes community online and whenever anyone says they are struggling to get life insurance or income protection I always give them Matthew's number. I think there needs to be a lot more awareness about what is available."

VOUCHEDFOR'S TOP RATED FINANCIAL COACHES

GREATER LONDON

Samie Dorgham	Octopus Money	28	E15	2
Hiren Panchal	Wensons Legacy	44	UB7	4

SCOTLAND

Graham Wells	GroWiser Financial Coaching	45	EH41	4
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SOUTH EAST ENGLAND

Justine O'Connell	Octopus Money	61	BN21	2
Alastair Ford	Meaningful Coaching	95	SG15	3

2025’s Top Rated Firms



We are delighted to share the **131 firms who qualified as Top Rated in 2025.**

The Top Rated Firm qualification is very stringent.

These firms invited all their clients to review them on VouchedFor, received a high response rate, and excellent ratings. They also use our Elevation system (which involves a low monthly fee) to monitor their client experience and perform well vs industry benchmarks in areas like client advocacy and regulatory risk.

Firms of any size can qualify, from one-person operations to national firms. Reading clients' feedback for these firms reaffirms the value of good advice: bringing peace of mind and helping people reach their goals, whether that be buying their dream home, protecting their family, retiring in comfort or something else.

This is important when, despite some 'green shoots' in the form of reducing inflation and strengthening stock markets, there is still much uncertainty to navigate.

Many congratulations to all the firms who attained Top Rated status in 2025.



Emily Wastie

EMILY WASTIE,
HEAD OF FIRMS, VOUCHEDFOR

LARGE FIRMS (50+ ADVISERS)

Firm name	Reviews	Advisers	Rating	Location
Sandringham Financial Partners	11,152	173	4.9	UK
Ascot Lloyd	8582	109	4.7	UK
Westminster Wealth Management	3029	61	4.8	England
The Private Office	4988	50	4.8	England

MEDIUM FIRMS (10+ ADVISERS)

Firm name	Reviews	Advisers	Rating	Location
Fidelius	2161	36	4.7	England, Scotland and Wales
One Four Nine Group	892	34	4.8	UK
Newcastle Financial Advisers	2893	31	4.9	England
Azets Wealth Management	513	31	4.8	UK
Forvis Mazars	2216	26	4.8	UK
One Financial Solutions	1700	26	4.9	UK
Charles Stanley	1013	24	4.7	UK
Brooks Macdonald	361	24	4.7	England, Scotland, Wales
Ellis Bates (part of Shackleton)	1861	18	4.8	UK
Isio Wealth Planning	391	15	4.7	Croydon
Equity And General Financial Services	301	13	4.8	London
HCI Chartered Financial Planners	841	12	4.8	Chester

LIFT-Financial	618	12	4.7	Altrincham, London, Edinburgh
Sedulo Wealth Management	343	12	4.9	London, Manchester, Liverpool
Magus Private Wealth	189	12	4.8	London
Active Financial Partners	52	11	4.8	Southampton
Forrester Boyd Wealth Management	734	10	4.8	Yorkshire, Lincolnshire, Nottinghamshire
AAB Wealth Chartered Financial Planners	587	10	4.8	UK
Holden & Partners	335	10	4.7	London, Kent

SMALL FIRMS (FEWER THAN 10 ADVISERS)

Firm name	Reviews	Advisers	Rating	Location
Medical Family Finance	826	9	4.8	London
Moneytree Wealth Management	341	9	4.8	Chester
Suttons Independent Financial Advisers	890	8	5	Manchester
Ryley Wealth Management	835	8	4.9	Doncaster, Nottingham
David James Wealth	442	8	4.9	Southampton, Ipswich, London
Meriden Financial Planning	544	7	4.9	Stourbridge
GPFM	446	6	4.9	Hertford, Kings Lynn
Cheltenham Independent Financial Advisers	367	6	4.9	Cheltenham

Platinum Financial Planning	327	6	4.9	Belfast
Smith and Wardle Financial Planning	318	6	4.9	Hitchin
Omega Wealth & Finance	254	6	4.8	Hull
FSS Wealth and Pensions	114	6	4.9	Stevenston
Dodd & Co Wealthcare	220	5	4.8	Carlisle
Kymin Financial Services	152	5	4.8	Newport
Virtu Financial Planning	119	5	4.9	Clitheroe
XL Independent Financial Advisers	93	5	4.8	Redhill, Ipswich
KBA FS	270	5	4.9	North West England
Bury Financial Advisers	759	4	4.9	Bury
MLP Wealth Management	697	4	4.9	Greater London
Wealthwide	436	4	4.9	Birmingham
Mearns & Company	373	4	4.9	Edinburgh
Tailored Financial Planning	334	4	4.9	St Helens
Fiducia Wealth Management	326	4	4.8	Chelmsford, Ipswich, Colchester
The Wilcox Young Partnership	270	4	4.8	Bournemouth
Ernest Grant	216	4	4.8	Birmingham
Ovation Finance	129	4	4.8	Bristol, Guildford, Oxford
Philip James Independent Financial Advice	879	3	4.9	Burford
Rowley Turton (IFA)	605	3	4.9	Leicester
Rosewood Wealth Management	469	3	4.9	Chesterfield

Bray Wealth Management	386	3	4.9	Chobham, Surrey
Ginkgo Financial	330	3	4.9	London
Romilly Financial	324	3	4.7	Cardiff
HarperLees Financial Planning	318	3	4.9	Chelmsford
Welsh & Taylor Wealth	283	3	4.9	Aberdeen
Walden Capital	275	3	4.8	Cambridge
Expert Wealth Management	236	3	4.9	Oxford
Christopher Little & Co	218	3	4.9	Otley
Wardour Investments	201	3	4.9	Gerrards Cross
WRS Fornham Financial Partners	182	3	4.9	Colchester
Pursuit Financial Planning	128	3	4.9	Barrow-In-Furness
Nicholson Brown	123	3	5	Oxford
Mulberry Bow	85	3	4.8	London
Libertas Financial Management	37	3	4.9	Falkirk
IronMarket Wealth	418	2	4.9	Stoke-on-Trent
Affluent Financial Planning	408	2	4.8	Bridge of Weir
Lifeplan Financial Management	309	2	4.8	Newcastle-upon-Tyne
Vizion Wealth Chartered Financial Planners	271	2	4.9	Stony Stratford
Brace Financial Wellbeing	259	2	4.9	Northampton, Warwick
Insight Wealth Financial Advisers	247	2	4.9	Northampton
Stonegate Wealth Management	236	2	4.9	Stone, Staffordshire
DBL Asset Management	205	2	4.9	Wilmslow

The information in these tables is correct as of 19th February 2025

Marketing material.

Everyone has a My.

Capital at risk. The value of investments and the income from them can fall as well as rise and are not guaranteed. Investors may not get back the amount originally invested.



MyHome, MyLife, MyClients, MyInvestments, MyFuture. Whatever your My is, our ready-made MyMap funds make investing for it simpler.

MyMap. Ready when you are.



BlackRock | Indexed to **FTSE RUSSELL**

Firm name	Reviews	Advisers	Rating	Location
Britannic Place Financial Management	198	2	4.9	Worcester
Positive Wealth Creation	181	2	4.9	Burnham-on-Sea
TFP Financial Planning	179	2	4.9	Chelmsford
Vital Financial Planning	178	2	4.9	Newport, Swansea
Maitland James Financial Planning	175	2	4.8	Northampton
Attain Wealth Management	162	2	4.9	Leighton Buzzard
Moscrops Financial Planning	146	2	4.9	Bolton
Financial Succession	146	2	4.9	Glasgow
Tingley & Cooper	141	2	4.9	London
Barwells Wealth	118	2	4.9	Lewes
Chartwell Financial Services	96	2	4.9	Warrington
Retirement Professionals	84	2	5	Manchester
Edward Asset Management	78	2	5	Liverpool
Citygate Financial Planning	62	2	4.9	London
Reed Financial Planning	56	2	4.9	Edinburgh
Independent Women	52	2	4.9	Edinburgh
Forgue Financial Services	41	2	4.9	Aberdeen
DW Wealth Management	20	2	4.9	Newcastle-upon-Tyne

Clifford Osborne Limited Independent Financial Advisers	547	1	4.9	Eastbourne
Credencis	256	1	4.9	Derby
Cordiner Wealth	255	1	4.8	Leeds
Worthington Financial Planning	247	1	4.9	Sandy
NorthStar Wealth Management	240	1	4.8	Southampton
Sheraton Financial Planning	242	1	5	Portsmouth
LightSide Financial Planning	248	1	4.8	Liverpool
Individual Financial Services	234	1	4.9	Stockport
Natalie Turner Wealth Management	216	1	4.9	Newcastle-upon-Tyne
Wilkinson Financial Management	214	1	4.9	Stockport
Lemon Tree Financial	212	1	5	Harrow
Thanks Wealth Planning	204	1	5	London
Fresh Approach Financial Planning	201	1	4.9	Malvern
Waymark Financial	199	1	4.9	Bank
High House Wealth Management	185	1	4.9	Birmingham
Newbridge Financial Planning	180	1	4.8	Belfast
Otus Financial Planning	167	1	4.9	Altrincham
Jane Smith Financial Planning	156	1	4.9	Milton Keynes
JM Wealth Planning	153	1	4.9	Swansea
Advice Matters Financial Planning	149	1	4.9	Kendal

WLS Investment Partnership	138	1	4.9	Rochester
Giles Warren Financial	136	1	4.9	Windsor
Strategic Vision Wealth Management	131	1	5	Oxford
KWL Wealth Management	131	1	4.9	Yeovil
Sweeny Wealth Management	123	1	4.9	Colchester
17 Wealth Management	119	1	4.9	Glasgow
Focused Financial	113	1	4.9	Maidstone
EVA Capital Management	113	1	4.8	Worcester
Rogerstone IFA	108	1	5	Newport
CC Mortgage Services	105	1	5	Redhill
Daniel Hyde Financial Services	104	1	4.9	Stoke-on-Trent
Mitchell Private Clients	74	1	5	Uckfield
Ruby Red Financial Planning	55	1	4.9	Ivybridge
How Money Matters	53	1	4.8	Llandrindod-Wells
PJL Wealth Management	47	1	4.9	London
Penny Jones	43	1	5	Exeter
Antony Ransom IFA	38	1	4.9	Leeds
Deep Dive Financial Planning	34	1	4.9	Bromley
Druthers Financial Planning	30	1	5	Windsor

The information in these tables is correct as of 19th February 2025

A message from 2050

Hello from 2050.

It’s you – yes, you – from the future. I want to thank you for making one of our wisest decisions: finding a financial adviser.

That choice changed everything. It turned late-night worries into confident plans. It gave us the freedom to build our business, explore the world, and care for our family.

Our adviser was more than a financial expert – they understood our dreams and helped bring them to life.

And behind them? The right technology to make it happen.

Today, as I watch our grandchildren thrive, I understand what a great decision it’s been. The future we hoped for didn’t just happen – it started with you.

Yours, gratefully,

You



Fundment is the technology empowering advisers to build futures like yours. Because great advice deserves great execution.



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