

Personal Finance Society Associate Firms – A-Z List

Associate firm is awarded by the Personal Finance Society to firms that have made a public commitment to a 'united profession' approach to building public trust in the sector helping to elevate the importance and value of professional mortgage advice and services.

Browse our full list of Associate firms below.

3D Financial Planning	3dfinancialplanning.co.uk
4 Financial Planning	4-fp.co.uk
Active Investment Managers Ltd	morgan-williams.co.uk
Acumen Financial Partnership Ltd	acumenfinancial.co.uk
Adamson Ross Ltd	adamsonross.co.uk
Anomaly Consultants Ltd	n/a
Anro Financial Planning Limited	anrofinancialplanning.co.uk
Arena Nagel Clark	nagelclark.co.uk
Arrowe Financial Limited	arrowefinancial.com
Barclay & Bond Financial Planners LLP	barclaybond.co.uk
Bateman Asset Management Limited	bateman-assetmanagement.co.uk
Blackfinch Investments Limited	blackfinch.com
Blevins Franks Financial Management Limited	blevinsfranks.com
Bloomfield & Associates Ltd	bloomfieldifa.com
Blue Fox Wealth Management Limited	bluefoxwealth.co.uk
Buckingham Gate Financial Services Ltd	buckinghamgate.co.uk
Campbell Cain Wealth Management Ltd	campbellcainwm.co.uk
Castle Financial Services Limited	castlefs.com
CBK (Swansea) Ltd	cbkwales.co.uk
Certus Financial Planning Limited	certus-fp.com
Chadney Bulgin LLP	chadneybulgin.com

Chapter House Wealth Management	chapterhousewealthmanagement.co.uk
Christina Clegg Financial Planning Services Ltd	ccfps.co.uk
Continuum (Financial Services) LLP	mycontinuum.co.uk
Cormack Wealth Management Limited	cormackwealthmanagement.co.uk
Corporate Wealth Ltd	cwealth.co.uk
CRS Consultants Ltd	crs-consultants.com
D A Owen Financial Services Limited	hbofs.co.uk
David Ingram	aimtwothree.com
Depledge Strategic Wealth Management Ltd	depledgeswm.com
DGS Independent Financial Advisers Ltd	dgsifa.com
Eastwood Financial Solutions	eastwood-ifa.co.uk
Edgewater Associates Limited	edgewater.co.im
Ely Wealth Management Ltd	elywealth.co.uk
Equilibrium Financial Planning LLP	equilibrium.co.uk
Face to Face Finance (Anglia) Limited	ftof-finance.co.uk
Fairfield Wealth Limited	fairfieldwealth.gg
Female Financial Management Ltd	femaleadviser.co.uk
Financial Framework Wealth & Estate Planning Ltd	financialframework.co.uk
Financial Management Bureau	finman.co.uk
Fisher and Co (Financial Services) Ltd	burtonandfisher.co.uk
Fletcher Associates Financial Services Ltd	fletcherfs.com
Future Life Wealth Management Limited	wealthmanagement.uk.com
Gerald Pepper Financial Management Ltd	gpfm.co.uk
Gower Financial Services Limited	gowerfinancial.com
Green Financial Advice Limited	iangreen.com
Greystone Financial Services Limited	greystonefs.co.uk

Hamnett Wealth Management	hamnettwealth.com
Hannay Wealth LLP	www.hannayinvestments.co.uk
Hanson Assured Ltd	hansonwealth.co.uk
Hartsfield Financial Services	hartsfield.co.uk
Haven Paraplanning Limited	havenparaplanning.co.uk
HK Wealth Managers Ltd	n/a
Holborn Assets Ltd	holbornassets.co.uk
ICF Financial Services Limited	icf-fs.co.uk
Independent Technical Support	qbpartners.co.uk
Indigo Financial Advice Ltd	indigoadvice.co.uk
J C Roxburgh (Financial Services) Ltd	roxburgh-group.co.uk
Kreston Reeves Financial Planning Ltd	krestonreeves.com/individuals/financial-planning
LFH Wealth Management Ltd	lfhwealthmanagement.co.uk
Life Matters Financial Planning Ltd	lifemattersfp.com
Lowes Financial Management Limited	lowes.co.uk
Lucent Financial Planning Ltd	lucentfinancialplanning.co.uk
Mark Dean Wealth Management (UK) Limited	markdeanwealth.com
Mattinson Ginty & Partners (Employee Benefits) Limited	mgpeb.co.uk
Mazars Financial Planning Ltd	mazars.co.uk
McLaughlin Financial Planning Ltd	mclaughlinfp.co.uk
Millbank Financial Solutions Ltd	millbankfs.co.uk
Millward Wealth Management	millwardwealth.com
Money Matters North East Ltd	moneymattersne.co.uk
Moneywise Investments Plc	moneywiseplc.co.uk
Montage Portfolio Management Ltd	montagewealth.co.uk

Moscrops Financial Planning (Bury) Ltd	moscropsfp.co.uk
National Farmers Union Mutual Select Investments Limited	nfumutual.co.uk/financial-planning
NextGen Planners Ltd	n/a
Nicholls Stevens (Financial Services) Limited	n/a
Northfield Wealth Ltd	northfieldwealth.co.uk
Oakmere Wealth Management Ltd	oakmerewealth.co.uk
Oakworth Financial Planning	oakworthfp.co.uk
OpenMoney Adviser Services Limited	open-money.co.uk
Paraplan Plus Ltd	theparaplanners.com
Paterson Financial Planning Ltd	patersonfp.co.uk
Pecunia Veritas Ltd	integratedparaplanning.co.uk
Pensionlite Ltd	pensionlite.co.uk
Pentins Financial Planners Ltd	pentinsfp.co.uk
Phoenix Wealth Management Ltd	n/a
Prismatic Wealth Limited	prismaticwealth.co.uk
Prosperis Ltd	prosperis.co.uk
R&G Financial Services Ltd	randgfinancial.co.uk
Red Star Wealth Management Limited	redstarwealth.co.uk
Reed Financial Planning Ltd	reedfinancialplanning.co.uk
Research Independent Financial Services Limited	researchindependent.co.uk
Robinson Financial Solutions Ltd	robinsonfinancialsolutions.co.uk
Rothesay Bennett Limited	rothesaybennett.co.uk
Russell & Co Independent Financial Advisers	russellinvestments.co.uk
S.F.S. Investments Limited	southernfs.co.uk
Scrutton Bland Financial Services Ltd	scruttonbland.co.uk
Select Wealth Management	selectwealthmanagement.com

Silverwood Money Management Ltd	silverwoodifa.co.uk
SMC Financial Services	smcfinancial.co.uk
Smith Hobbs Wealth Management Ltd	smithhobbswealth.co.uk
Sparrow Paraplanning	sparrowparaplanning.co.uk
Spear Financial Limited	spearfinancial.co.uk
Stratagem Financial Planning	stratagemfp.co.uk
Succession Wealth Management Ltd	n/a
Susan Hill Financial Planning	susanhillfp.co.uk
Syndaxi Financial Planning Ltd	n/a
Telford Mann Ltd	telfordmann.co.uk
The Informed Partnership Ltd	informedfinancialplanning.co.uk
The Orchard Practice (AR) Ltd	topfs.co.uk
Thornton Associates Ltd	thorntonfs.com
Unividual	www.unividual.co.uk
Varsity Independent Financial Planning Ltd	varsityifp.co.uk
Verum Financial LLP	verumfinancial.co.uk
Verus Financial Planning Limited	n/a
Warwick Wealth Management Ltd	warwickwm.co.uk
Weldons Wealth Management Ltd	weldons.co.uk
Wensons Financial Ltd	wensonsfinancial.com
Wetherall's Ltd	wetheralls.co.uk
Whiteleaf Financial Plc	whiteleaf.co.uk
Whiting Group Limited	whitings.co.uk
Whittington Goddard Associates Ltd	wg-associates.co.uk
Winders Financial Services Ltd	winders.co.uk

WKM Wealth Limited

wkmwealth.co.uk

Last updated: 1 February 2021