

Top 7 Best Financial Advisers in Leeds, UK

2016 RANKING OF TOP WEALTH ADVISERS

Finding the Best Financial Advisers in Leeds, UK

The financial services industry has evolved from what it used to be even a decade or so ago.

Gone is the market saturation by brokers and dealers who want your money first and your business second. Gone is the insistence on fitting you into a preferred financial plan that helped a small minority of clients achieve financial success.

While these brokers and advisers still exist, they are being trumped by the overwhelming success of independent advisers. And by 'success' we mean 'client success,' not strictly the firms' successes.

This has happened because many financial advisers, including financial advisers in Leeds, wised up to what it means to offer true client-focused service. Not only was it ethical, and not only was it the right thing to do, but there was also a growing market for it.

With that in mind, we have the current landscape of investment advisory services dominated by independent financial advisers. This is bad news for traditional, broker-first companies and good news for you, the potential client.

But lest we give the impression that all independent financial advisers are created equal, we compiled our list of the top eight best financial advisers in Leeds.

Read on for more information about the best financial advisers in Leeds and the criteria with which we selected them.



AdvisoryHQ's List of the Best Financial Advisers in Leeds, UK

List is sorted alphabetically (click any of the names below to go directly to the detailed review section for that advisor):

- **Allied Financial Services Ltd**
- **Clayton Holmes Naisbitt Financial Consultancy LLP**
- **Grange Court Financial Management LLP**
- **Macintosh James & Partners**
- **NBS Financial Planning Ltd**
- **Tilney Bestinvest**
- **Towry Holdings Limited**

Top 7 Independent Financial Advisers in Leeds, UK

Firm	Location
Allied Financial Services Ltd	Leeds
Clayton Holmes Naisbitt Financial Consultancy LLP	Leeds
Grange Court Financial Management LLP	Leeds
Macintosh James & Partners	Leeds
NBS Financial Planning Ltd	Leeds
Tilney Bestinvest	Leeds
Towry Holdings Limited	Leeds

Methodology for Selecting Financial Advisers in Leeds, UK

What methodology did we use in selecting this list of best financial advisers in Leeds, UK?

Using publicly available sources, AdvisoryHQ identified a wide range of financial and wealth management firms that provide services in Leeds, UK, and surrounding areas.

We then applied AdvisoryHQ's [Breakthrough Selection Methodology](#) to identify the final list of top advisory firms that provide services to communities in and around Leeds, UK.

Click here for a detailed review of our methodology: [Methodology for Ranking Top Advisors in the U.S and U.K.](#)

Detailed Review – Top Ranking Financial Advisers in Leeds, UK

Below, please find the detailed review of each firm on our list of top advisers and financial planners in Leeds. We have highlighted some of the factors that allowed these Leeds financial advisory firms to score so high in our selection ranking.

Allied Financial Services Ltd Review

[Allied Financial Services Ltd](#) is a Leeds wealth management firm founded in 2005 by Nick Wylie and Alisdair Lindley. It is an Independent Financial Adviser (IFA) regulated by the Financial Conduct Authority (FCA).

The firm has grown through [several acquisitions](#) since their founding. These include purchasing Platinum Financial Services, Whittall Smith & Associates, and IFA Ltd.

Key Factors that Enabled This Firm to Rank as a Top 2016 Wealth Advisory Company in Leeds, UK

Listed below are some features of this firm that we believe make for a quality financial adviser.

Experienced Team:

Allied is made up of four Leeds financial planners. Between these four team members, the firm boasts over [80 years](#) of collective experience in the financial services industry. This makes Allied extremely qualified and equipped to handle even the most complex financial situations.

Individualised Planning Approach:

Allied advisers take a [holistic, customised approach](#) to planning your financial future. They get to know you, your concerns, your goals, and every pertinent fact relating to your money before recommending a course of action. No two plans are alike, and Allied doesn't force you into a preferred mould.

Transparent Fee Policy:

When engaging with Allied, [you know right away how much you're paying for service](#). An Allied adviser takes you through the first four stages of their planning process with no cost to you.

These are the introductory phases, or the time when your adviser gets to know you in order to better prepare your financial plan. Allowing your adviser to craft a financial report incurs a flat fee that is communicated prior.

Furthermore, choosing to implement the financial report through your Allied adviser results in your planning fee being waived and a new fee applied. The new fee is calculated according to the nature and complexity of your plan.

Not only this, but Allied allows for different payment schemes, as well. You may pay as a percentage of the amount to be invested, hourly, or fixed.

All commissions from protection products are relayed to you in advance in a transparent fashion. Your adviser does not proceed with the purchase without your approval.

Comprehensive, Long-Term Plans:

When it comes to Leeds wealth managers, we like that Allied has risen above the fray by preferring to forge strong, long-term relationships with their clients.

You can see this in their [comprehensive financial planning](#). Not only are they willing to help you manage your investments, but they want to ensure you have the proper amount of life assurance and health care coverage.

Additionally, your Allied adviser can help structure your pension plan to better suit your long-range goals. Pension planning is the first step in retirement planning, yet another way Allied proves its commitment to your financial future, whether short-, medium-, or long-term.

Through it all, Allied advisers review your plan for the best ways to save money. Your life assurance, your pension planning, and the investments you make—it's all economized for maximize tax efficiency. This leaves more money in your pocket with which to invest and secure your future.

Authorised & Regulated by the FCA:

Allied is an Independent Financial Adviser (IFA), and as such is [authorised and regulated by the FCA \(Financial Conduct Authority\)](#) (see disclaimer at bottom of page).

The FCA dictates that IFAs such as Allied must provide recommendations from [“the whole of the market.”](#) Your Allied adviser cannot, therefore, restrict your access to global investments.

In keeping with this principal, firms authorised and regulated by the FCA must provide advice and services that are in [the client's best interests](#).

This translates into unbiased advice from your adviser. Recommendations are not made in the firm's favour but wholly in yours.

Team of Independent Financial Advisers:

Regarding their status as [Independent Financial Advisers \(IFAs\)](#), Allied and its team members are unbounded by private interests. They are not governed by a parent company or make decisions with input or undue influence from third parties.

This feature, in concert with the FCA regulation, results in objective advice and a much broader range of investment opportunities for you, the client.

Philanthropy:

We like that Allied is a Leeds wealth manager that gives back to [charities and community organizations](#). Some of these include the following:

- Steve Prescott Foundation
- Donna Louise Trust
- Douglas McMillan Trust
- Wigan & Leigh Hospice
- Teenage Cancer Trust
- Cancer Research UK

Clayton Holmes Naisbitt Financial Consultancy LLP Review

[Clayton Holmes Naisbitt Financial Consultancy LLP](#) (CHN) is an investment advisory firm in Leeds. CHN was founded in October 2008 by Lee Clayton, Richard M. Holmes, and Paul Naisbitt.

The firm is registered with the FCA as an [Independent Financial Advisor](#). In addition to this designation, certain team members achieved the Chartered Financial Planner distinction, the highest in the financial services industry.

Key Factors that Enabled This Firm to Rank as a Top 2016 Wealth Advisory Company in Leeds, UK

Listed below are some features of this firm that we believe make for a quality financial adviser.

Independent & Client-Focused:

As mentioned above, CHN is an [Independent Financial Adviser \(IFA\)](#). This designation legally binds the firm to act in the best interest of their clients above everything else.

As a result, your CHN adviser only makes suggestions in-line with your needs. No product or service is offered that isn't genuinely needed or deemed helpful to your financial affairs.

Likewise, their role as an IFA mandates accessibility to the entire market. Your CHN adviser cannot and will not restrict your asset selection, products, or services.

More information on CHN's authorisation and regulation by the FCA can be read on the firm's [Treating Customers Fairly](#) page.

Elite, Professional Certification:

While not all of CHN's team members are Chartered Financial Planners, many of them are working toward the same designation. This is considered the gold standard in UK financial services as providing toptier, up-to-date financial planning advice.

Firm co-founder [Lee Clayton](#) has attained Chartered Financial Planner status and is involved in each stage of CHN's comprehensive financial planning services.

[Richard Holmes](#) is similarly designated, having also been certified a Fellow of the Chartered Insurance Institute (CII). This designation is an elite certification, the highest within the insurance industry for advisers who work with insurance products and services.

Plans Unique to You:

CHN made our list of the best Leeds financial advisers because of their approach to customisation. They understand that no two clients' needs are alike, and to that end they provide [tailored plans](#) that address your financial needs and goals.

Your life situation and financial affairs are [thoroughly reviewed](#). No stone is left unturned, so to speak. Every relevant piece of data is considered when constructing your plan.

Fees, like the plans themselves, are also customised. Consequently, financial planning costs vary from client to client. All costs and fees are disclosed upfront, however, after an initial, extensive review performed at no cost to you.

Transparent, Long-Range Focus:

CHN lays out [each phase of planning](#), as will your adviser upon consultation. This ensures maximum transparency throughout the process, as well as avoiding confusion later on. No phase is implemented without your explicit consent.

This is an important consideration given the breadth to which your CHN adviser can round out your financial plan. CHN is structured to assist you with all manner of financial concerns, be it upcoming needs, future goals, and everything in between.

If you need *a la carte* services or products, your CHN adviser can definitely help. However, if you need bespoke financial service packaging, CHN is well-suited to provide the same.

This rightly indicates how CHN wants to be a partner with you throughout your continuing life's journey. Their focus is to provide you the best coverage from now until past retirement.

Charitable Giving:

We prefer to recommend wealth management firms in Leeds that give back to charitable causes. We're happy to report that CHN is one of these firms, giving consistently to the following charities:

- St. Gemma's Hospice
- Kamla Foundation
- Cancer Research
- Memusi Foundation

Specific information about each of these charities can be found by accessing CHN's [Charity](#) page.

Grange Court Financial Management LLP Review

[Grange Court Financial Management LLP](#) is a Leeds financial planner founded in July 2013 by Darryl-Louise Shirtliff, Jennifer Storey, and David Wynick.

The firm is an Independent Financial Adviser (IFA). Their primary service offerings centre on personal investors and families. However, they do operate a boutique, bespoke financial planning service to [dental and medical professionals](#).

Key Factors that Enabled This Firm to Rank as a Top 2016 Wealth Advisory Company in Leeds, UK

Listed below are some features of this firm that we believe make for a quality financial adviser.

Independent:

Grange Court Financial Management [is an IFA](#), or Independent Financial Advisor, in Leeds that operates without commitments to a parent company, third party, or any outside interests. They are wholly autonomous and provide conflict-free advice.

As an IFA, Grange Court Financial Management is legally obligated by the power of the Financial Conduct Authority (FCA) to dispense quality, client-centric advice. This means adhering to the client's best interests above all else as well as recommending products from the full range of the market.

Grange Court Financial Management advisers do not withhold recommendations on products out of self-interest. To the contrary, if a product or service suits your plan best, Grange Court Financial Management advisers don't hesitate to suggest it to you.

They have no interests inherent to this process that can complicate or otherwise conflict with the advice dispensed. That's quality financial advice you can trust.

Transparent Consumer Protections:

Your investments are in trustworthy hands with a Grange Court Financial Management adviser. But we were nevertheless happy to learn that Grange Court Financial Management provided [additional consumer protections](#).

For instance, regulated products* such as insurance, investments, and mortgages enjoy protection from the Financial Ombudsman Service (FOS) as well as the Financial Services Compensations Scheme (FSCS).

The process for handling complaints involves a resolution directly with Grange Court Financial Management. However, failing that, you are entitled to register select complaints with the FOS.

The FOS works with both customers and financial advisers when mediating disputes. Their rulings are mandated upon the financial adviser no matter the outcome.

**Does not include unregulated products such as taxation advice or certain buy-to-let mortgages.*

Partner for Life:

Grange Court Financial Management investment advisers in Leeds seek to work with you [for life](#). This includes assisting with savings, investment management, pension planning, assurance needs, retirement, long-term care, and more.

By committing to you in such a manner well into the future, Grange Court Financial Management advisers are compelled to provide transparent, client-focused care. It's just one more feature that helps make Grange Court Financial Management an investment adviser in Leeds that you can trust.

Open Fee Structure:

You don't want to do business with anything less than a transparent wealth manager in Leeds. This is particularly true when discussing the fee structure under which the adviser operates.

Grange Court Financial Management's fee structure is [open and transparent](#) from start to finish. You'll never make a decision regarding your financial plan without first understanding the associated costs. What's more, Grange Court Financial Management is flexible when taking payment for their services. They offer three tiers of service to fit your specific budget and advisory needs.

Macintosh James & Partners Review

[Macintosh James & Partners](#) (MJP) is a wealth management firm in Leeds. The firm was formed in July 2004 by Paul Macintosh and Simon James.

The latter partner is actively involved in the firm's day-to-day processes as a Chartered Financial Planner. Additionally, the firm is registered as an Independent Financial Adviser (IFA).

Prior to founding MJP, the two principals [worked together](#) within the Private Client division of Granville Baird.

Key Factors that Enabled This Firm to Rank as a Top 2016 Wealth Advisory Company in Leeds, UK

Listed below are some features of this firm that we believe make for a quality financial advisor.

Extensive Certification:

Co-founder Simon James sports a litany of professional and industry-related certifications, the breadth of which is too numerous to list here. Nevertheless, they all speak to the firm's commitment to ongoing education and top-notch service by staying current with industry developments.

Some of James's designations include, but are not limited to, the following:

- Chartered Financial Planner
- Certified Financial Planner
- Fellow of the Personal Finance Society

- Chartered Insurance Institute's Advanced Diploma in Financial Planning
- Chartered Insurance Institute paper G10 Taxation & Trusts
- Chartered Insurance Institute paper G20 Savings & Investments
- Chartered Insurance Institute paper AF2 Business Financial Planning
- Chartered Insurance Institute paper AF3 Pension Planning
- Chartered Insurance Institute paper AF4 Investment Planning

To read more about Simon James's certifications, visit his [professional bio](#) on the MJP website.

Additional certifications represented among MJP's Senior Team are:

- Society of Later Life Advisers (SOLLA)
- Advanced Financial Planning Certificate (AFPC)
- Investment Management Certificate
- Investment Portfolio Management (G70) unit

Work as a Team:

Client advisers don't go it alone when working with clients. Rather, [the entire team at MJP](#) pools knowledge and resources as needed to provide more informed and vetted solutions.

Not only that, but your MJP adviser is more than willing to work with your current stable of advisers. This can include your solicitor, accountant, or personal financial adviser.

Flexible Payment Options:

The [fee structure](#) at MJP is clear-cut and assigned according to your specific plan and budget. Each is communicated transparently and ahead of services being performed.

The fee options available to you include:

- Percentage of assets under advisement
- Hourly fees
- Project-based fees
- Fees encompassed within commission from a product provider

Custom Planning:

MJP employs an [extensive process](#) designed to learn as much about you and your financial posture as is relevant to your financial plan. This process may require patience and some extra time, but it is a bulwark against shoddy recommendations and inaccurate advice.

Once all your pertinent data and details have been gathered, your MJP adviser constructs a plan built around you. Your financial health, your needs, goals, dreams—it's all taken into account. Your plan is built around you in order to make your financial hopes a reality.

Long-Term Investment in You:

One way MJP proves their commitment to you is by the custom planning process they have in place. They create personalised financial plans with your objectives in mind, and they want to help you see all of them through, whether short-, medium-, or long-term.

This includes implementing your plan and monitoring it. Some financial advisers are designed to do no more than create plans and allow the client to implement, monitor, and revise as needed.

But your MJP advisers wish to [transcend these short-term services](#), which is why they gladly put your plan into action and review it regularly.

The [breadth of services](#) available to you further underscores MJP's investment in helping you for the long-term.

These encompass general wealth management services as well as areas of specialisation that include, but are not limited to, the following:

- Wealth creation, protection, and preservation
- Asset management
- Tax planning
- Life assurance and health care
- Retirement planning

In addition to all of this, your MJP adviser [works with your existing cadre of consultants](#) to maximize the implementation and efficiency of your plan.

This may include working with your solicitor, accountant, or other financial professional.

Independent:

MJP conducts itself as an [independent financial adviser](#). They are not beholden to product quotas, sales incentives, or any other form of kickback compensation.

To this end, your MJP adviser retains access to the whole of the market when recommending products and services. In the spirit of transparency and conflict-free financial advisory, MJP does not sell its own products, nor does it withhold commission data associated with the sale of a specific product.

All products, commission-based or otherwise, are thoroughly reviewed, screened, and verified for viability. When commissions are involved in the sale of a product, your adviser notifies you from the start and proceeds only with your consent.

NBS Financial Planning Ltd Review

[NBS Financial Planning Ltd](#) is a financial planner in Leeds founded by Nigel Barker Smith. Smith is an Independent Financial Advisor (IFA) with [more than 20 years](#) of experience in the financial services industry.

Key Factors that Enabled This Firm to Rank as a Top 2016 Wealth Advisory Company in Leeds, UK

Listed below are some features of this firm that we believe make for a quality financial advisor.

Transparent, Fee-Only Advice:

What helped propel NBS onto our list of investment advisory firms in Leeds is their unabashed commitment to transparency.

Being [fee-only](#) means your NBS adviser won't charge you for commissions or incentives, nor do they earn compensation for the sale of investment products. You pay only for the advice you receive, nothing else.

Custom, Comprehensive Planning Process:

The [process at NBS](#) is detailed, rigorous, and centred around you. Firstly, a no-cost initial consultation is conducted to get to know more about you. Additional discovery meetings are held to ensure complete and accurate receipt of your data.

After assessing your financial health and needs, an NBS adviser devises a financial plan entirely customized to you. NBS calls this [Financial Life Planning](#).

Before this plan is implemented, however, NBS informs you of all associated costs. This measure of transparency and forthrightness guarantees honest and upfront dealings with your NBS adviser should you decide to engage.

Plans vary from person to person, and so do the costs to implement them. Your plan may not cost the same as another client's plan, but not only is that to be expected, it's a logical outgrowth of custom financial planning.

No matter your expense, however, you can rest assured that your plan has been built only for you, is relayed from the start, and contains no hidden charges.

Independent Financial Advisers:

NBS is an [Independent Financial Adviser \(IFA\)](#). As such, they are lawbound to make only the most relevant and useful recommendations to each client. They put your interests ahead of their own.

Not only that, but NBS is regulated by the Financial Conduct Authority (FCA). The FCA requires Independent Financial Advisers to select products from the entire available market. IFAs such as NBS cannot restrict your choices, save for advising what's best for your financial future.

Nor will they restrict, instead selecting from a broad spectrum of products to help you reach your financial goals. And you can be guaranteed that each product in some way addresses your needs and concerns.

Long-Term Relationships:

In keeping with NBS's desire to offer custom financial plans that address the breadth of your financial needs, they likewise prove keen on engaging you for [the long-term](#).

Your NBS adviser remains by your side no matter what. Whether market volatility, unexpected life crisis, or economic turbulence that affects your finances, your adviser helps guide you through the storm. Together, you'll come out the other side with your goals still in sight.

To that end, NBS advisers refuse to engage in the following [high-risk, short-term strategies](#):

- 'Picking' stocks
- 'Timing' or 'beating' the market
- Chasing fund managers

Tilney Bestinvest Review

[Tilney Bestinvest](#) is a network of wealth managers in Leeds and elsewhere across the UK.

The firm was originally founded in 1836 as Thomas Tilney & Sons by Thomas Tilney and his two children, George and Robert. The firm was dissolved in the 1860s and later reformed as RJ Tilney & Co.

In 2014, Tilney was purchased and merged with Bestinvest, forming Tilney Bestinvest. At present, the firm manages in excess of [£9 billion](#) in assets as an Independent Financial Adviser (IFA).

Key Factors that Enabled This Firm to Rank as a Top 2016 Wealth Advisory Company in Leeds, UK

Listed below are some features of this firm that we believe make for a quality financial advisor.

Awards:

Tilney has racked up quite a few [awards](#) in recent years in recognition of sterling service and client experience. Some of the awards won by Tilney are:

- Readers' pick for *Investors Chronicle* and *Financial Times* Stockbroker of the Year for 2013, 2014, and 2015
- *Investors Chronicle* and *Financial Times* 2015 Best Self-Select ISA Provider
- COLWMA (City of London Wealth Management Awards) Award for Best Advisory Service 2015
- Private Asset Managers Award in the Investment Performance, Cautious Portfolios category
- *Investors Chronicle* and *Financial Times* Wealth Manager of the Year Award 2013

Giving Back to the Community:

One thing that boosts an adviser's standing and trustworthiness is interacting with their communities. Do they donate money? Volunteer their time? Or does scant evidence exist of their interest in charitable giving?

We happily report that Tilney is one of the more actively charitable Leeds investment advisory firms. Several staff members from many of Tilney's offices across the UK lend both time and money to worthy causes.

Some examples of Tilney's philanthropic giving include, but are not limited to, the following:

- Lister Steps children's charity
- Triumph at the Citywire 10k run
- The Lodging House Mission
- Marie Curie Hospice

- Liverpool contemporary arts fair
- Sailing with the Ocean Youth Trust

For more information on Tilney's participation in charities and community-related fundraising, visit the [In The Community](#) page.

Independent Financial Adviser:

Tilney made our list of the best Leeds investment advisers due to their independent nature. They operate autonomously from external pressures or interests, which translates into always putting your best interests at the centre of every recommendation they make.

On top of that, Tilney is [authorised and regulated](#) by the Financial Conduct Authority (FCA) as a certified Independent Financial Adviser, or IFA. Because of this, the law mandates that the financial planning you receive from Tilney be calibrated to your specific needs and concerns.

Tilney is not legally permitted to chase their own bottom line. Instead, they work for your success alone.

Flexible Range of Services:

One thing we liked about Tilney that we didn't see in many other financial planners in Leeds is the [range of advisory offerings](#).

And while Tilney advisers can consult with you about a number of financial planning considerations, there are four primary services under which most other services fall. These include:

- **Investment management:** Want your Tilney adviser to directly manage your investments? This option is for you.
- **Investment advisory:** This option is geared toward clients who want to manage their investments on their own but who need expert financial advice to get started.
- **Bespoke financial plan:** The all-in-one, comprehensive plan. Your Tilney adviser draws up a plan addressing every area of your life, from taxes to retirement all the way down to estate planning.

- **Portfolio advisory:** This service is useful for clients who want advice on a transaction-by-transaction basis as opposed to bespoke or encompassing investment advisory.

Plans Fit to Your Needs:

Your Tilney adviser takes the time to [learn about you](#), about your financial goals and needs, and the uses you have planned for your money.

Once they capture each piece of financial data, they set to work on customising your plan. Every product they recommend is chosen according to your unique needs and situation.

This is true for each of Tilney's services. Financial planning, investment management, investment advisory, or portfolio advisory—no matter what, your adviser gets to know you and help you in the most personalised way possible.

Transparent Fee Structure:

Perhaps the thing we like the best when we find good Leeds wealth management firms is a transparent fee structure. Tilney fits this criteria. Tilney [doesn't earn commission](#) on the sale of financial products. This avoids potential conflict-of-interest with your advisor. As a result, you can trust that what they're telling you is in your best interest.

Fees are assessed as a [percentage of your portfolio](#), and what's more, your percentage is clearly communicated upfront. No hidden charges, no bait-and-switches. Just the truth and a credible adviser.

Towry Holdings Limited Review

[Towry Holdings Limited](#) is an independent financial adviser in Leeds. The firm began in 1964 as John Scott & Partners after being founded by John Scott.

In 2003, Palamon Capital Partners, LP, invested in the firm. Between 2007-2010, the firm was renamed multiple times until arriving at its current moniker of Towry.

Today, the firm utilizes a team 750 people strong throughout the UK. Those employees share ownership status with Palamon Capital Partners. For more information on Towry's growth and development through the years, visit their [Our Heritage](#) page.

Key Factors that Enabled This Firm to Rank as a Top 2016 Wealth Advisory Company in Leeds, UK

Listed below are some features of this firm that we believe make for a quality financial adviser.

Regulated by the FCA:

Towry, like the best financial advisers in Leeds, is [regulated by the FCA](#). The FCA requires authorised financial advisers such as Towry to suit their business operations around what's best for the client.

As a result, Towry advisers do not aim to fatten the firm's bottom line. Rather, they dispense advice that is appropriate and as useful to your specific situation as possible.

To accomplish this, and to avoid competing interests, Towry advisers enjoy access to the entire financial product marketplace. What worked in the past for other clients might not work for you.

Your Towry adviser understands this, and they ensure that your portfolio is accurately informed by your needs and goals.

Personalised Financial Plans:

When you engage with a Towry adviser, you're not doing business with someone keen on shoehorning you into a prefabricated financial plan.

To the contrary, your adviser is patient in getting to know you and [understanding the breadth and depth of your current financial situation](#).

You tell them [your objectives, goals, and dreams](#), and they formulate a plan to help you get there.

Your concerns aren't shrugged off or ignored. Instead, you function as the hub for every recommendation that your Towry adviser makes for your plan.

Long-Term Relationship with Clients:

Not only does Towry devise plans specific to client needs, but they do so in a comprehensive and holistic manner. These plans encompass everything from debt and taxes to retirement and inheritance issues.

This speaks to the firm's desire for a successful, long-term relationship with you, the client. This desire can even be seen in the very names of the two principal approaches that Towry takes to financial planning and wealth management: [Lifetime Financial Plan](#) and [Lifetime Wealth Management Plan](#).

In these ways, Towry earns your trust and operates with high standards of transparency because Towry knows that if you don't trust them, they not only lose your business, but your financial dreams may be put in peril.

Giving You a Choice:

Towry puts the power in your hands to [choose how you wish to engage their services](#). This adds a further level of customisation to an already comprehensive and personalised approach.

You may opt for Towry's bespoke financial plan if you wish to have a catered, individualised plan. Or you can pay your adviser to draw up a sound investment strategy that you then implement yourself.

Or perhaps all you seek is investment management on a discretionary basis. In this case, Towry has you covered with their aptly-titled Discretionary Investment Service.

Whatever level of management and interaction you seek, your Towry adviser can deliver.

Philanthropy:

Towry and its employees participate in a number of community-based outreaches, charitable fundraising, and environmentally-conscious initiatives.

A sampling of [Towry's charitable involvement](#) includes:

- [Towry Charitable Trust](#)
- Fundraising bike rides
- Marie Curie Cancer Care
- Animals of Asia
- Cancer Research UK's Race for Life
- Lymphoma Research Trust half-marathon
- Supporting the National Reading and Numeracy programme

Awards & Recognition:

Towry has been the recipient of numerous awards for outstanding service and philanthropic efforts. Some of these [awards](#) include the following:

- The 2015 Payroll Giving Award for making charitable payroll donations available to employees
- Private Client Practitioner's Top 25 Most Admired Companies for 2014 & 2015
- Private Client Practitioner's Top 25 Financial Planning Companies for 2014
- The 2014 Investment Management Team of the Year at the International Finance Awards hosted by Acquisitions International

Open & Honest Fee-Only Service:

When you hire a Towry adviser, you won't work with someone who sneaks in hidden charges or attempts to pawn off their commissions into your costs and fees.

Rather, all Towry advisers operate according to a [fee-only structure](#). This means you pay a simple percentage of your total assets under management.

The percentage and the amount are relayed honestly and immediately upon engaging with your Towry adviser. No guessing or worrying about what you're paying and if you're paying too much.

Conclusion – Top 7 Best Financial Advisers in Leeds, UK

With your financial future on the line, you owe it to yourself and your family to secure your money as soon as possible.

In today's financial services climate, plenty of advisers seek to put you in the driver's seat. Others may let you navigate, and still others may tolerate you as a backseat driver.

But only a truly independent financial adviser—the likes of which exists in greater preponderance today than ever before—sits beside you throughout the long road ahead.

All with the intention of seeing you unharmed and on-time to every goalpost and milestone along the way.

Many of these advisers offer a free initial consultation at no cost to you, leaving your decision to hunt down a quality, reputable financial adviser an easy one.

But the decision to act, however simple, won't be easy. Plenty of good firms exist. It's up to you to commence with choosing one and protecting your future.

If you have questions, comments, or tips about this 'Top 7 Best Financial Advisers in Leeds, UK' article, send us an **email**. Follow us on social media to be the first to hear about major economic news stories.

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Cheers,

AdvisoryHQ Team