

Top 7 Best Financial Advisers in Leeds, UK | 2017 Ranking | Top IFAs in Leeds

2017 RANKING & REVIEWS TOP RANKING BEST FINANCIAL ADVISERS IN LEEDS, UK

Finding the Best Financial Advisers in Leeds, UK

Leeds is the third largest city in the UK. It's currently one of the biggest business centers in the United Kingdom, outside of London. Historically, Leeds was a booming manufacturing city with a growth that was fuelled by a rich wool industry.

In the last few decades, it has made the successful transition towards focusing on financial services. With more infrastructure developments it is [poised to rival London](#) by joining forces with its fellow metropolis in the north, Manchester.

With such a thriving financial services industry, it's only expected that there are people in need of a financial adviser in Leeds—and financial advisers in Leeds who are willing to oblige.

We've rounded up some of the top picks for financial advisers and planners in the UK to make your selection process a lot easier.



Award Emblem: Top 7 Best Financial Advisers in Leeds

How do you go about finding a top financial adviser in the UK?

How exactly does one go about finding a financial adviser in Leeds?

It does depend on what you need a financial adviser for. If you are an American looking for a financial adviser in Leeds, the landscape may be a tad different from what you're familiar with.

In the United States, the term financial adviser or "financial advisor" usually refers to an individual who helps high-net-worth individuals manage their assets. In the United Kingdom, there are several different categories of financial advisers who assist all sorts of people.

Financial advisers in Leeds and elsewhere in the UK may go by different names, depending on what their specialty is, but they are ultimately regulated

by the [Financial Conduct Authority \(FCA\)](#). For the purposes of this article, there are two general categories of financial advisers registered in the UK:

- Independent Financial Advisers
- Restricted Financial Advisers

Both have to pass the same qualifications and adhere to the same standards set by the Financial Conduct Authority, but they are different in the kind of service they offer.

An Independent Financial Adviser in Leeds can recommend a broad range of products from across the financial services industry. A Restricted Financial Adviser, on the other hand, is limited to specific products and will only recommend those products whether they are mortgages, insurance, or investment assets.

A Restricted Financial Adviser cannot refer to themselves as an Independent Financial Adviser or tell a client that they offer independent advice.



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**
- **[Leodis Wealth](#)**
- **Macintosh James & Partners**
- **Martin Hirst Financial Consultancy**
- **NBS Financial Planning Ltd**
- **SMG F.S.**

Top 7 Independent Financial Advisers in Leeds, UK | Brief Comparison

Financial Advisers in Leeds	Highlighted Features
Allied Financial Services Ltd	Individualized Planning Approach
Clayton Holmes Naisbitt Financial Consultancy LLP	Lifestyle Financial Planning
Leodis Wealth	Personal Taxation Services
Macintosh James & Partners	Team-Based Approach
Martin Hirst Financial Consultancy	Assistance with Mortgages
NBS Financial Planning Ltd	Comprehensive Financial Planning
SMG F.S.	Corporate Finance

Table: Top 7 Best Financial Advisers in Leeds | Above list is sorted alphabetically

AdvisoryHQ's Selection Methodology

What methodology does AdvisoryHQ use in selecting and finalizing the credit cards, financial products, firms, services, and products that are ranked on its various top-rated lists?

Please click here "[AdvisoryHQ's Ranking Methodologies](#)" for a detailed review of AdvisoryHQ's selection methodologies for ranking top rated credit cards, financial accounts, firms, products, and services.

Detailed Review—Top-Ranking Financial Advisers in Leeds, UK

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

See Also: [Best Financial Advisers in Manchester and Cheshire, UK | Ranking | Manchester & Cheshire IFAs and Wealth Managers](#)

Allied Financial Services Ltd Review

[Allied Financial Services Ltd](#) is a Leeds wealth management firm founded in 2005 by Nick Wylie and Alisdair Lindley.

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

Allied Financial Services is an Independent Financial Adviser (IFA) regulated by the Financial Conduct Authority (FCA). They do not explicitly say whether they are a fee-only or fee-based wealth management firm in Leeds.

Key Factors that Enabled This Firm to Rank as a Top Wealth Management Firm 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, this Leeds wealth management firm boasts more than [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. These Leeds financial advisers 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 specific 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 independent financial adviser in Leeds 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 you are informed of before it is created.

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, as an hourly rate, or fixed.

All commissions from protection products are relayed to you in advance in a transparent fashion. Your Leeds independent financial 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 choosing 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 protection and health care coverage.

Additionally, your Allied financial adviser in Leeds can help you structure your pension plan to better suit your long-term 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 insurance, your pension planning, and the investments you make—it's all economized for maximize tax efficiency. This leaves more money in your pocket 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 Financial Conduct Authority (FCA).

The FCA dictates that IFAs such as Allied must provide recommendations from the entire market. An Allied independent financial adviser in Leeds cannot restrict the products they offer you or suggest to a specific company.

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 name of increased profits for the firm, but for the benefit of their clients.

Team of Independent Financial Advisers

Regarding their status as [Independent Financial Advisers \(IFAs\)](#), Allied and its team members are not tied by private interests. These independent financial advisers in Leeds 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 management firm that gives back to [charities and community organizations](#). Some of the organizations it supports include:

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

[Don't Miss: Best Financial Advisers in the UK | Ranking | Top UK IFAs & Independent Investment Firms](#)

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.

This wealth management firm in Leeds 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. They do not explicitly say whether they are a fee-only or fee-based wealth management firm in Leeds.

Key Factors that Enabled This Firm to Rank as a Top Wealth Management Firm in Leeds

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 this wealth management firm in Leeds to act in the best interests of their clients above everything else.

As a result, your CHN adviser at this Leeds wealth management firm 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 for providing top-tier, 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 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](#). 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 a number of financial concerns including upcoming needs, future goals, and everything in between.

They offer a number of [specific services](#) that include:

- Investment Review
- Protection Review
- Taxation Review
- Estate Planning Review
- Pensions Review
- Lifestyle Financial Planning
- Retirement Planning

Charitable Giving

This financial advisory firm in Leeds makes it a priority to spread the wealth by supporting the following [charities](#):

- St. Gemma's Hospice
- Alzheimer's Society
- Jane Tomlinson Appeal
- Memusi Foundation

[Related: Best Financial Advisors in Wisconsin | Ranking | Top Wisconsin Wealth Managers](#)

Leodis Wealth Review

[Leodis Wealth](#) is a Leeds wealth management firm that offers independent advice to its clients. They provide financial planning and asset management services for individuals, trusts, and pension funds. Their focus is on providing personalized, bespoke financial advice for their clients so that they can count on their firm for generations to come.

They are an independent financial advisory firm that is registered with the Financial Conduct Authority (FCA). They do not explicitly say whether they are a fee-only or fee-based wealth management firm in Leeds.



Key Factors that Enabled This Firm to Rank as a Top Wealth Management Firm in Leeds

Client-Centric Core Values

Leodis Wealth clearly outlines its core values on its site, and the details they provide emphasize their commitment to providing a client-centered experience for people who choose to work with their financial advisers in Leeds. They are:

- **Client Focused:** They want to build an atmosphere of trust for their clients that is based on "discretion, clarity, and integrity."
- **Holistic Service:** They help clients incorporate all elements of their financial life into their financial planning and offer other services like portfolio management as needed.
- **Independence:** This firm's focus is on building long-term relationships with its clients. Not on making a quick buck in the name of a commission and at the expense of objectivity.
- **Providing value for money:** This firm offers a wide range of service to complement their financial advice and carefully selects third parties as needed.

Disciplined Investment Approach

This wealth management firm in Leeds believes in using a disciplined approach to investing. They combine this discipline with flexibility to ensure they can take advantage of great opportunities without instantly jumping to change a client's portfolio at every small fluctuation in the market.

Their approach leverages multiple assets to diversify their client portfolios. The managers at this wealth management firm in Leeds meet regularly to discuss to evaluate their exposure in major asset classes in order to make adjustments as needed.

These independent financial advisers in Leeds also pay ample attention to risk management. While rewards are a fun part about investing, risk is an important reality. Wealth managers avoid this side of the coin at their own peril. This firm's independent and common sense approach to investing serves

as a guide for realizing returns for their clients without putting their wealth in jeopardy.

Financial Planning

It's not impossible to live comfortably in retirement or grow your wealth without a plan—it's just risky, difficult, and can lead to avoidable losses.

Allowing a wealth management firm in Leeds, like Leodis Wealth, to help you map out your financial journey is a helpful way to plan for expected life events (marriage, retirement, a child's tuition) and be protected for unexpected life events (a death in the family, divorce).

With the understanding that each client has different goals and expectations, Leodis Wealth's financial advisers in Leeds take the time to appreciate everyone's goals and see how they can systematically work towards them. This includes an assessment of the following things:

- Income
- Expenditures
- Assets and liabilities
- Pension
- Family circumstances

The [financial planning advice](#) that this wealth management firm in Leeds provides covers the following areas:

- Protection against tragic events like illness, accident or death
- Provision for loved ones through pensions, wills, and trusts
- Preservation of wealth in the face of taxation and inflation

Personal Taxation Services

Creating a financial plan is optional. Paying your taxes is not. But if you make the choice to do them both, you're in for smoother financial sailing.

This wealth management firm in Leeds offers an in-house specialist for clients who do not have their own accountant to manage their taxes. The service provided by this in-house specialist includes help with the annual return and reviews to ensure all the choices you are making for your financial plan and portfolio are tax efficient.

[Popular Article: Top Financial Advisors in Greensboro, Chapel Hill, & Winston-Salem, NC | Ranking | Greensboro, Chapel Hill, & Winston-Salem Wealth Managers](#)

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

This financial advisory firm in Leeds is registered as an Independent Financial Adviser (IFA). They do not explicitly say whether they are a fee-only or fee-based wealth management firm in Leeds.

Key Factors that Enabled This Firm to Rank as a Top Wealth Management Firm in Leeds

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

Extensive Certifications

Co-founder Simon James holds many [professional certifications](#). 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

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 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 before any services are performed.

The fee options available to you include:

- Percentage of assets under advisement
- Time costed
- Project based

Custom Planning

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

Once all the relevant details have been gathered, your MJP financial adviser in Leeds constructs a plan built around you. Your financial health, needs, goals, and dreams are 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 in Leeds 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 dedication to 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 insurance and health care
- Retirement planning

In addition to all of this, your MJP financial adviser in Leeds 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 financial adviser in Leeds considers solutions from across the market when recommending products and services. In the spirit of transparency and conflict-free financial advice, 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 Leeds financial adviser notifies you from the start and proceeds only with your consent.

Read More: [Top Financial Advisors in Phoenix & Scottsdale, AZ | Ranking | Phoenix & Scottsdale Wealth Managers](#)

Martin Hirst Financial Consultancy Review

[Martin Hirst Financial Consultancy](#) is a wealth management firm in Leeds that offers financial advice to both individuals and companies. They help clients prioritize their objectives so that they can take a focused, long term approach to working toward them.

Martin Hirst is an Independent Financial Adviser in Leeds that is registered with the Financial Conduct Authority. They do not explicitly say whether they are a fee-only or fee-based wealth management firm in Leeds.

Key Factors that Enabled This Firm to Rank as a Top Wealth Management Firm in Leeds

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

Assistance with Mortgages

For many people, their house will be their biggest investment and their largest source of equity. Their monthly mortgage payment will be their biggest bill. As a result, selecting the right mortgage will be one of the most important decisions they ever make. The right independent financial adviser in Leeds can help individuals make smart, strategic choices.

This wealth management firm in Leeds can help individuals weigh the [different mortgage types](#) available to them and figure out what they should responsibly put down as a down payment while retaining some sort of a safety net.

They can help clients with a number of different mortgage scenarios including capital and interest mortgages, interest only mortgages, flexible mortgages, lifetime mortgages, and reversion schemes.

Pensions & Retirement Planning

Many people are catching up to the fact that they cannot rely on the state to provide for them in retirement. You may not even be able to rely on the company you've been working for for the last decade.

It's important to think of a comprehensive retirement plan that will keep you protected even if governments change or you lose your job.

Recent changes have allowed people to put away larger sums of money depending on their situation. With some restrictions, individuals can invest [up to 100% of their earnings or £3,600](#) (whichever is higher) into their retirement savings.

This wealth management firm in Leeds can help you come up with a sustainable plan to prepare for retirement. They can also ensure you do not get hit with penalties for failure to comply with specific limits.

For instance, if you pay in over a certain amount in a given retirement year then you may be taxed on what is over that amount.

An independent financial adviser in Leeds from Martin Hirst can help you come up with a plan and make sure it's a good one that is in line with all of the rules.

Life Assurance

This is an important factor to think about, especially when it comes to protecting your wealth and ensuring your long-term financial health. While it is smart to be covered for certain contingencies, you want to select your plans wisely.

An independent financial adviser at Martin Hirst can help you find assurance while taking taxes, cost, and necessary protection into consideration.

You can use life assurance to protect a number of things including your income, loved ones, and your business. There are even ways in which a wealth management firm in Leeds can help you arrange things so that life assurance minimizes your taxes.

Assurance products are often the most challenging to find since firms may be tempted to hawk their product or a partner company's product as opposed to a more suitable one from another firm.

Fortunately, Martin Hirst is an independent financial advisory firm, which means they are required to consider options from a range of providers and cannot limit clients to products from a specific company.

[Related: Best Financial Advisors in Atlanta, GA | Ranking | Atlanta Area Wealth Managers](#)

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.

NBS Financial Planning Ltd. is a [fee-only](#) wealth management firm in Leeds. It is one of the few firms in the UK that uses the "fee-only" terminology.

Key Factors that Enabled This Firm to Rank as a Top Wealth Management Firm in Leeds

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 fee structure.

Being [fee-only](#) means your NBS financial adviser in Leeds 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 with this wealth management firm in Leeds 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 is good news for individuals who are anxious about unexpected costs or fees from a wealth management firm in Leeds.

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 \(IFA\)](#) in Leeds. As such, they are law-bound to make only the most relevant and useful recommendations to each client. They put your interests ahead of their own.

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.

These financial advisers in Leeds select 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 financial adviser in Leeds remains by your side no matter what. Whether it is 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

SMG F.S. Review

[SMG F.S.](#) is a wealth management firm in Leeds that has both individual and corporate clients on its roster. It provides on topics ranging from retirement planning to corporate protection.

SMG F.S. is a firm of Independent Financial Advisers that are regulated by the Financial Conduct Authority. They do not explicitly say whether they are a fee-only or fee-based wealth management firm in Leeds.

Key Factors that Enabled This Firm to Rank as a Top Wealth Management Firm in Leeds

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

Guidance for Lump Sum Investments

Sometimes you've got a lot of money that you don't really need in the near future. It's a great financial position to be in, and you can make it an excellent financial position by refusing to let it lie dormant in your savings account.

A Leeds financial adviser from SMG can help you optimize your investments to let that money work for you until you're ready to use it.

These financial advisers in Leeds can help you [when it comes to](#):

- Individual Savings Accounts (ISA)

- Investment Bonds (onshore and offshore)
- Unit Trusts
- OEICs
- Exchange Traded Funds
- Investment Trusts
- Structured Products

Corporate Finance

Most of the services wealth management firms in Leeds and elsewhere offer to individuals (financial planning, investment advice, tax planning) are all things that corporations require as well. S

MG offers this service for enterprises who need help figuring out how to reach company goals in 5, 10, or 20 years, how to invest their assets in a way that balances growth and protection, and when to make crucial decisions like buy more equipment or hold off.

This wealth management firm in Leeds can help businesses with the [following](#):

- Commercial Mortgages
- Investment
- Tax Planning

Corporate Protection

Both individuals and corporations need protection, but figuring out exactly what kind of protection is needed is more challenging. Not only can this wealth management firm in Leeds help companies grow their wealth, they can also help them protect their wealth as well.

Their understanding of the market and their status as a firm of Independent Financial Advisers helps this financial advisory firm in Leeds sort through a number of products to get corporate clients what they need. They can [help with](#):

- Keyperson Assurance
 - Co-Shareholder Assurance
 - Partnership Assurance
 - Keyperson Income Protection
-

Conclusion—Top 7 Best Financial Advisers in Leeds, UK

You owe it to yourself and your family to speak with a financial adviser in Leeds and secure your financial future. In today's world of financial advice, there are so many resources for knowing how to select a great adviser and firms that prioritize putting the client in the driver's seat.

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

Plenty of good firms exist. It's up to you to get started with finding one.

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