
9 Best Wealth Management Firms & Financial Advisers in London, UK | 2018 Ranking

2018 RANKING & REVIEWS BEST LONDON FINANCIAL ADVISORS

2018 Ranking of the Best London Financial Advisers

As both the capital and the most populous city in England and the United Kingdom (UK), there's no denying that London is a mega-hub of culture, business, travel, and entertainment.

Of course, with nearly 9 million residents and a steady stream of commerce, tourism, and real estate, it's hardly surprising that London is one of the most expensive cities in which to live and work in the UK.

Although Oxford has recently surpassed London in terms of the least affordable UK cities to live in, [The Independent](#) lists Greater London at a solid second, with an average home price growth of 57 percent over the past five years.

With rising costs of living, it only makes sense for residents to seek the best financial guidance possible to ensure that they can meet their financial goals, whether they be short-term or long-term.

While finding a financial adviser in London might be easy, finding the right London wealth management firm for you and your family is a much harder task. The sheer quantity of London financial advisers only increases the challenges that London residents face when selecting one.

To make the process of selecting an adviser into an easier, more efficient process, we have assembled a list of the top financial advisers in London to give you a leg up on your way to financial success.



Award Emblem: Top 9 Best Financial Advisors in London

Top 9 Best London Financial Advisors | Brief Comparison & Ranking

Best UK Financial Advisors in London	Highlighted Features	2018 UK Ratings
Alexander House Financial Services	Expert advice on purchasing a home	5
Attivo Financial Planning	Commitment to independent, unbiased advice	5
Foster Denovo	Tailored financial planning	5
Holden & Partners	Ethical, sustainable, and thematic investments	5
John Lamb	Wide range of financial capabilities	5
Skerritts Chartered Financial Planners	Industry-recognized excellence	5
Strabens Hall	International financial planning	5

Burlington Associates Limited	Experienced advisory team	3
Devonshire Wealth Management	Bespoke and transactional services	3

Table: Top 9 Best London Financial Advisors | Above list is sorted by rating

Tips for Selecting the Best Financial Advisors in London, UK

When it comes to choosing the best London financial advisor, there are plenty of firms to choose from. With so many options to consider, how can you narrow the search?

First, take a close look at what each financial advisor in London has to offer, and match those services up with your own personal financial goals.

As you will see in the following reviews for London wealth management firms, each London financial advisor specializes in varying areas of financial planning and wealth management.

If your needs are of a broader nature and you wish to have peace of mind through simple yet comprehensive financial planning, you may be well-suited with a London financial planner that offers a broader range of services.

Once you've narrowed down your choices to a select few of these top-ranking London wealth management firms, see if any of your selected advisors offers an introductory consultation session.

Whether it's a free or paid consultation, this can be a good way to "feel out" a prospective financial advisor in London before committing to their services.



Best Financial Advisors in London

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 of the Best London, UK Wealth Management Firms

Below, please find a detailed review of the top financial advisors in London. We have highlighted some of the factors that allowed each London wealth management firm to score so highly in our selection ranking.

Click on any of the names below to go directly to the review section for that London advisory and wealth management firm.

- [Alexander House Financial Services](#)
- [Attivo Financial Planning](#)
- [Burlington Associates Limited](#)
- [Devonshire Wealth Management](#)
- [Foster Denovo](#)
- [Holden & Partners](#)
- [John Lamb](#)
- [Skerritts Chartered Financial Planners](#)
- [Strabens Hall](#)

Alexander House Financial Services Ltd. Review

[Alexander House Financial Services Ltd](#) (AHFS) is a London IFA with local advisors spread all across the UK.

With individual, corporate, and specialized services, this top London financial adviser strives to integrate traditional values, modern thinking, and transparent advice into all that they do.

AHFS does not explicitly say whether they are a fee-only or fee-based London wealth management firm. You can find more information on their [compensation structure](#) on their website.

Key Factors That Enabled Alexander House Financial Services Ltd. to Rank as One of the Top London Wealth Management Firms

Flexible, Upfront Fee Structure

At AHFS, your fees are communicated upfront, including the breakdown of services for which you're paying. [As described by AHFS](#), their fee structure entails:

Our fees are based wholly upon the provision of our qualified and professional expertise; the time taken to analyse your circumstances and devise an appropriate strategy going forward; the design of an appropriate summary report to communicate this strategy to you; and takes into account our firms exposure to regulatory, commercial and financial risk.

While this London wealth management firm does not call itself either fee-only or fee-based, they are transparent about what their fees are for different services, representing a strong, client-facing commitment.

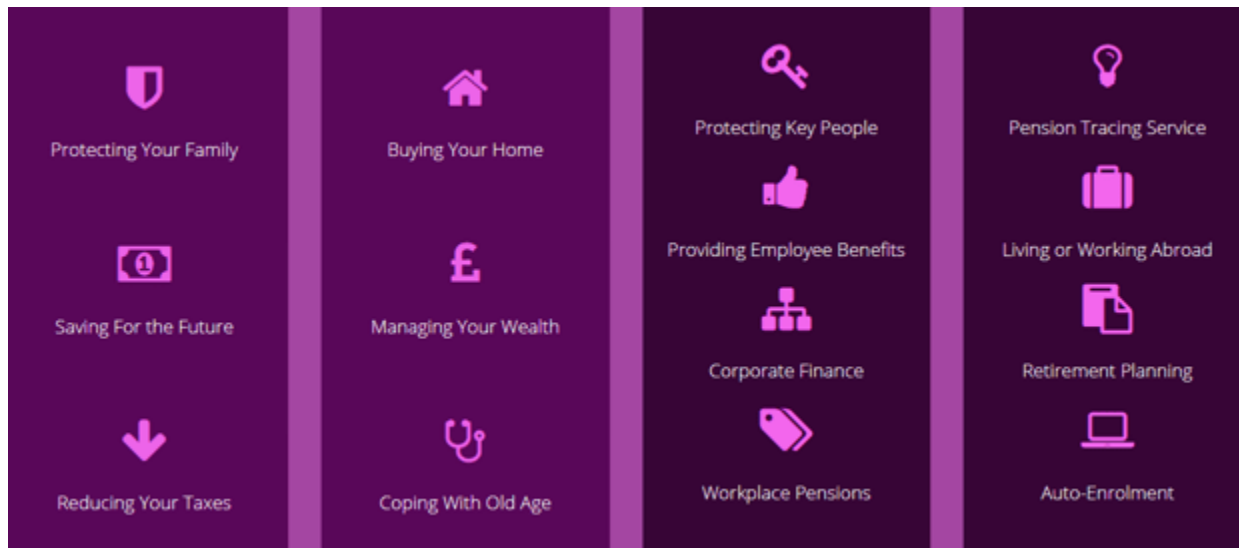
Advice for Buying a Home

Even for those with multiple properties, purchasing a new residence or commercial property is a financial choice they want to make carefully.

The London financial advisors at AHFS can help individuals approach buying property strategically by addressing questions like:

- What will my costs be after I buy this house?
- Do I want to repay this mortgage on a month by month basis, or simply pay the interest and save on my own?
- Should I opt for a fixed or variable rate?
- Should I pay my mortgage off over a shorter or longer period of time?

Acquiring the services of a financial planner in London can help you answer these questions in a way that will keep you secure moving forward.



Alexander House Financial Services - London

Rating Summary

For anyone who is looking for the best wealth management firms in London, it's hard to beat Alexander House Financial Services.

With a diverse range of services, a transparent fee structure, a talented team, and multiple offices across the UK, Alexander House Financial Services is one of the top London financial advisors to consider partnering with this year.

[See Also: Top Financial Advisers \(IFAs\) in Manchester and Cheshire, United Kingdom](#)

Attivo Financial Planning Review

Founded in 1998, [Attivo Financial Planning](#) is a privately owned, independent, and Chartered group of London financial advisors.

Attivo Financial Planning does not specify whether they are a fee-only or fee-based financial advisor in London. As always, we recommend verifying compensation structure before partnering with any wealth management firm in London.

Key Factors That Enabled Attivo Financial Planning to Rank as a Top London Wealth Management Firm

Wide Range of Financial Services

As a top financial advisor in London, Attivo Financial Planning strives to provide clients with services that can meet both short-term and long-term financial needs. These services include:

- Independent Financial Planning
- Cash Flow Modelling
- Occupational Pension Specialist
- Investment Portfolio Review
- Retirement Planning
- Tax Planning
- Estate Planning
- Corporate Services

The London IFAs at Attivo also have access to professionals that can help with other services, like mortgages, insurance, and wills, extending their resources and providing valuable connections for their clients.

Commitment to Independence

Part of what makes Attivo one of the top London financial advisors is their fierce commitment to remaining independent.

As an independent firm, the London IFAs at Attivo are not under pressure to promote specific financial products, meaning that their clients receive truly unbiased financial advice.

For Attivo, this independence is what truly allows each of their London financial planners to provide the best possible recommendations—and one of the primary reasons why clients choose to partner with the firm.



Attivo Financial Planning - London

Rating Summary

As one of the best London financial advisers, Attivo Financial Planning provides clients with a wide range of financial services and an unwavering commitment to independence, providing a strong foundation for long-term financial planning relationships.

With a wholly client-centric model of service and a talented team, Attivo is one of the best financial advisers in London to consider partnering with this year.

Burlington Associates Limited Review

Established in 2003, [Burlington Associates Limited](#) is a top-ranking independent financial adviser in London.

Burlington Associates Ltd. identifies itself as a [fee-based](#) financial planner that also offers non-financial planning services under a transactional service model.

Key Factors That Enabled Burlington Associates Limited to Rank as a Top Wealth Management Firm

Comprehensive Financial Planning

Individuals searching for independent financial advisers in London will greatly benefit from Burlington Associate's holistic financial planning approach, covering the broad spectrum of a client's financial well-being. This includes:

- Analyzing your current financial position
- Preparing for retirement
- Protection for death, disability, and long-term illness
- Education fees
- Inheritance tax
- General tax mitigation considerations

As one of the top independent financial advisers in London, the firm also offers corporate advice and mortgage assistance, providing a wide range of London wealth management services for clients to choose from.

Experienced Advisory Team

Staff and advisers serving clients at Burlington Associates have relevant industry experience ranging from ten to thirty years. The team brings a variety of professional backgrounds and industry certifications to the table, including:

- Chartered Insurance Institute G60 Pension qualification
- Fellow of the Chartered Insurance Institute
- Chartered Financial Planner
- Mortgage Advice Qualification
- Financial Planning Certificate

As leading financial advisers in London, the company offers clients not only dedicated advisers but also alternate touch points within the firm so that their needs are addressed expeditiously.

Rating Summary

As a top independent financial planner in London, Burlington Associates Limited excels at providing detailed, holistic, and client-based services, with a unique expertise in legal firms, medical and dental professionals, and businesses.

However, our review did find some room for improvement, particularly in how the firm's services and capabilities are communicated. For example, while the firm's Wealth Management services are explained in great detail, this section is significantly dense (text-heavy), making it difficult to identify exactly what types of services are available.

By presenting their services with a more user-friendly approach, Burlington Associates could easily improve both their value proposition to new clients and their rating as a top financial advisor in London.

Don't Miss: [Top Financial Advisers in Leeds, UK](#)

Devonshire Wealth Management Review

[Devonshire Wealth Management](#) is a boutique financial advisor in London that has been around [since 1983](#).

For over three decades, the Devonshire team of London financial advisers has been providing bespoke and transactional financial and wealth management advice and recommendations to clients, with over £100m in assets under management.

We could not confirm whether Devonshire is a fee-based or fee-only London wealth management firm. As always, we recommend verifying fee structure before partnering with any financial advisor in London.

Key Factors That Enabled Devonshire Wealth Management to Rank as One of the Top Financial Planners in London

Bespoke or Transactional Services

Based on an individual client's needs, Devonshire Wealth Management offers a mix of bespoke and transactional services. Bespoke services include:

- Access to a dedicated account team
- Access to associated legal and accounting practices
- Valuation reports every quarter or every six months
- Cash flow modelling of future income and capital positions
- Regular and unlimited contact with your account team and UK financial adviser
- Investment review meetings
- Tax and estate planning
- Retirement planning

Transactional services include:

- Mortgage advice
- Release of equity from your home
- Commercial finance
- Bridging loans
- Life assurance protection
- Annuity purchases
- Health insurance

While the former model works for clients that are looking for a comprehensive wealth management and financial planning relationship with London financial advisers, the latter approach is often suited to the needs of clients who need advice on specific aspects of their financial lives.

Assessing Investment Risk Tolerance

For new and experienced investors alike, assessing risk is an integral part of the portfolio management process.

As one of the top wealth management firms in London, Devonshire recognizes the importance of risk and takes a comprehensive approach to ensure that risk preferences are uniquely matched to each client. This process includes:

- The suitability of different tax wrappers
- The use of different asset types
- Diversification across countries, currencies, industries, stocks, and commodities
- An independent fund selection process
- Consistent re-balancing



Devonshire Wealth Management

Rating Summary

As a top London IFA, Devonshire maintains a highly client-centric focus, stressing the importance of building relationships and maintaining integrity and professionalism.

Although Devonshire excels at providing clients with a strong value proposition, a diverse range of services, and a clean, user-friendly interface, our review did find areas for improvement in how their services are communicated.

Without specific details on crucial components like retirement planning, tax and estate planning, or types of investment securities available, potential clients may find it difficult to evaluate the firm's full range of capabilities.

By elaborating on these aspects of their financial services, Devonshire Wealth Management could easily improve both their value proposition to new clients and their rating as one of the best London financial advisers.

Foster Denovo Review

Originally established in 2005, [Foster Denovo](#) is a financial advisor in London with offices across the UK, serving individuals and their families, businesses, and employers.

Foster Denovo does not explicitly describe itself as fee-based or fee-only. As always, we recommend verifying compensation structure before partnering with a financial advisor in London.

Key Factors That Enabled Foster Denovo to Rank as a Top Wealth Management Firm in London

Tailored Financial Planning

As a top London wealth management firm, Foster Denovo is well-equipped to handle a variety of financial challenges through tailored financial planning services, including:

- Financial planning with cash flow modelling
- Preserving established wealth through trusts and inheritance planning
- Optimising tax allowances
- Pension advice and retirement planning
- At-retirement advice and assistance with pensions
- Independent mortgage support and advice
- Protection for clients and their families against unforeseen circumstances
- Comprehensive personal insurance

With a range of comprehensive services, the London financial advisers at Foster Denovo can work alongside clients to help them accomplish both long-term and short-term goals.

Large, Talented Team

For many clients, part of finding the best financial advisor in London is finding a firm with an accredited, talented staff. Industry accreditations demonstrate a commitment to excellence, but they also show that an advisor is up-to-date on best industry practices.

The team of London financial advisers at Foster Denovo bring a wide range of professional experiences and certifications, including:

- Diploma for Financial Advisers (DipFA)
- Financial Planning Certificate
- Advanced Financial Planning Certificate in Savings
- Diploma in Regulated Financial Planning
- Advanced Diploma with the Chartered Insurance Institute (CII)
- Chartered Financial Planner
- Certified Financial Planner

Rating Summary

As a top wealth management firm in London, Foster Denovo provides clients with a wide range of services and educational resources, solidifying their rating as one of the top London financial advisers.

Uniquely, Foster Denovo also excels at providing detailed biographies of each team member, including professional qualifications, history, and specialisms, demonstrating a commitment to building relationships with clients, even before an introductory meeting occurs.

Related: [Best Financial Advisors in Toronto, Canada](#)

Holden & Partners Review

Founded in 2003, [Holden & Partners](#) is a firm of independent financial advisers in London.

The firm delivers a range of bespoke investment and financial advice to its clients, with specific specialisation in sustainable and ethical investments.

Holden & Partners' fee structure depends on the type of service provided, the time spent on delivering those services, and the asset value being advised on. As always, we recommend verifying compensation structure before partnering with any London IFA.

Key Factors That Enabled Holden & Partners to Rank as a Top Wealth Management Firm in London

Wide Range of Financial Planning Services

As one of the top London financial advisors, Holden & Partners provides clients with an impressive range of bespoke, comprehensive financial services. These include:

- Pensions and Retirement
- Tax Planning
- School Fees Planning
- Lifetime Cashflow Analysis
- Protecting What Matters
- Long Term Care
- Divorce and Separation
- Equity Release
- Company Benefits

Financial goals and situations are subject to fluctuate over time, and this wide range of services makes Holden & Partners a London IFA that clients can confidently sustain a long-term financial planning relationship with.

Ethical, Sustainable, and Thematic Investments

Holden & Partners takes a unique approach to investments, specialising in EST (Ethical, Sustainable, and Thematic) investment options. This allows investors to align their portfolio with their personal principles, while still promoting long-term growth.

The London IFAs at Holden & Partners take a research-driven approach to identify companies that are not only profitable, but those that are also making valuable contributions to society and to the environment.

Uniquely, this dedication to ethical and environmental responsibility does not stop with EST investments. Holden & Partners maintains an Environmental Policy, which includes external company promotions, professional memberships, environmentally friendly day-to-day policies, and more.



Holden & Partners

Rating Summary

For clients looking for a comprehensive, expert, and personalised approach to financial planning, Holden & Partners is a great fit.

The founders of the company have deliberately maintained a small footprint, with each adviser managing a reasonable number of clients. This has enabled these London financial advisers to deliver high-quality, one-on-one advice to every client.

With a unique expertise in ethical investing and an impressive range of financial planning services, Holden & Partners is one of the best financial advisers in London to consider partnering with this year.

John Lamb Review

[John Lamb](#) is an independent financial adviser in London that provides clients with expert financial advice to help them both preserve and grow their wealth.

While we were unable to confirm whether John Lamb is a fee-based or fee-only financial advisor in London, the firm does [state](#) that they provide “a flexible service with a fair and clear fee structure.”

As always, we recommend confirming compensation structure before partnering with any London IFA.

Key Factors That Enabled John Lamb to Rank as a Top London Wealth Management Firm

Wide Range of Expertise

For many consumers, part of finding the best London financial advisers means finding a firm that can grow and adapt as their financial needs change over time. To that end, John Lamb provides clients with an impressive range of capabilities, including:

- **Financial Planning**—Holistic approach to helping individuals and families make the most of their finances
- **Investments**—Focuses on preserving wealth and carefully enhancing its value
- **Tax Planning**—Finds tax-efficient ways to save, invest, protect, and pass on wealth
- **Pensions**—Applies technical expertise to retirement planning
- **Equity Release**—Uses a network of lenders to secure attractive fixed or variable rates
- **Inheritance**—Guidance for tax-efficient ways to pass on wealth
- **Protection**—Aligns insurance policies with your overall financial plan through [John Lamb Insurance Broking](#)
- **Divorce**—Provides professional and considerate advice for clients undergoing a divorce

The John Lamb Difference

As an independent firm with Chartered Financial Planner status, John Lamb provides clients with proven expertise and industry knowledge. The firm also maintains a strong value proposition to their clients, which includes (but is not limited to) the following commitments:

- **Dedication to Excellence**—These London IFAs are dedicated to the firm’s core values, driving excellence through their work and relationships with clients, colleagues, and specialists

- **Knowledge & Ability**—The London financial advisors at John Lamb are committed to maintaining and developing their skills and always working to the best of their abilities
- **Listening & Understanding**—Developing a deep understanding of each client’s financial situation, commitments, and aspirations is crucial to creating a successful financial plan
- **Clarity & Precision**—Financial advice is clearly articulated in a straightforward way, maintaining clarity, attention to detail, and accuracy
- **Transparency & Flexibility**—Fees are clear and flexible, and match the level of complexity of advice

Rating Summary

John Lamb provides clients with an impressive range of financial capabilities and a strong client-centric philosophy, making the firm one of the best London financial advisers for new and seasoned investors alike.

With a talented team and a strong list of financial services, John Lamb is one of the top financial advisors in London to consider partnering with this year.

Popular Article: [Top Financial Advisors in Montréal & Ottawa, Québec, Canada](#)

Skerritts Chartered Financial Planners Review

[Skerritts Chartered Financial Planners](#) is a firm of London IFAs that caters to both personal and corporate clients.

The firm does not explicitly say whether they are a fee-based or fee-only wealth management firm in London. We advise readers to confirm a financial advisors compensation structure before starting a working relationship.

Key Factors That Enabled Skerritts Chartered Financial Planners to Rank as a Top London Wealth Management Firm

Wide Range of Financial Services

As independent financial advisers in London, Skerritts offers clients a wide range of unbiased, comprehensive financial services. These include:

- Wealth protection
- Wealth creation
- Wealth management
- Mortgages
- Insurance comparison
- Group pensions
- Benefit packages
- Auto-enrolment
- Corporate investment consulting
- Directors planning
- Business protection

Recognised Excellence

Recognised as a top London independent financial adviser, Skerritts has won numerous awards and accolades, including recognition as a top UK IFA by AdvisoryHQ for the past three years.

This London wealth management firm has won the New Model Adviser® award [seven consecutive times](#), from 2011 to 2017, and has been the proud finalist for MoneyMarketing's Adviser Awards in two categories.

The firm also has the distinction of being amongst a select group of independent financial advisers in the South East to serve clients as both discretionary investment managers (DIMs) as well as Chartered Financial Planners (CFPs).



Top Wealth Management Firms in London

Rating Summary

As a top London IFA, Skerritts Chartered Financial Planners provides clients with clear benefits through independent advice from a strong, talented advisory team.

With a wide range of financial services, a commitment to independence, and a strong team, Skerritts is one of the best London IFAs to consider partnering with this year.

Strabens Hall Review

Founded in 2007, [Strabens Hall](#) is an independent, [fee-based](#) London wealth management firm that specialises in financial planning, investments, and wealth structuring.

Along with serving clients across the UK, this London IFA also maintains an office in Hong Kong to provide wealth management to clients in South East Asia and Europe.

Key Factors That Enabled Strabens Hall to Rank as a Top Financial Advisor in London

Strategic Financial Planning

To be successful over the long-term, financial planning should be both comprehensive and customised, fitting each client's needs as they fluctuate over time.

As a top independent financial adviser in London, Strabens Hall begins each financial planning relationship by getting to know each client's unique circumstances, tailoring their services accordingly to address financial challenges like:

- Tax-Efficient Planning
- Multi-Jurisdictional Planning
- Pension Planning
- Inheritance Tax Planning
- Life Insurance and Ill-Health Protection
- Cash-Flow Modelling
- Estate Planning
- Liquidity Management
- Trusts and Foundations

International Financial Planning

For clients that must navigate global and UK tax systems, partnering with an experienced London IFA like Strabens Hall can help eliminate the confusion and complexity of creating effective planning solutions across a range of jurisdictions.

As a global firm, Strabens Hall can assist clients with the following international financial planning challenges:

- Multi-Currency Investment Advice
- Resident Non-Domiciled Tax Environment
- Offshore Pension Planning
- Holding Structures for UK Property
- Protection Planning

Rating Summary

Whether they are looking for incremental or ongoing financial advice, Strabens Hall provides their clients with comprehensive and personalised financial planning strategies, making the firm a great choice for new and experienced investors alike.

Additionally, with a unique global perspective, Strabens Hall is one of the best financial advisors in London for individuals or businesses with multi-jurisdictional challenges to consider partnering with this year.

[Read More: Top Financial Advisors in Kansas City, Leawood, and North Kansas City](#)

Conclusion – Best Wealth Management Firms & Financial Advisors in London

As you can see, many of the best London financial advisers share common traits: a client-centric approach, a wide range of services, and a long-term focus on your success.

It would be hard to go wrong with any of these advisors in London. But of course, not every firm—no matter how rigorous our research and methodology may be—is going to be right for you.

This means a little bit of research on your part. Which London IFA meshes with your worldview? Which financial planner in London offers the services, investment opportunities, and type of relationship that you are looking for in a firm that's going to handle your money and your future?

After all, you have specific needs, goals, and dreams for your money and your future. Just as you are not a one-size-fits-all type of client, neither are these advisors a one-size-fits-all solution.

Rate Table Disclaimer

Click here to read AdvisoryHQ's [disclaimer on the rate table\(s\) displayed](#) on this page.

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