JM FINN

Investment | Wealth

Introduction to JM Finn

We look after your wealth so you can nurture your passions

From our early days as a stockbroker we have listened to our clients' needs. Now as a full-service wealth management firm we have evolved to serve many generations of investors, in line with their individual wealth requirements.

Whatever your reasons for investing, we aim to make the process as easy as possible so you do not have to worry about it. This allows our clients to nurture their passions and interests safe in the knowledge that their wealth is in our expert care.

Our personalised services also offer peace of mind that should your circumstances change, we have the flexibility to change the investment approach accordingly.

An individual approach to wealth management

The firm was established in 1945 when our founder, a successful commodities broker, had the foresight to predict the collapse of the commodities market following the end of the Second World War.

Recognising that company ownership as an investor would likely become more widespread, he bought a stockbroking firm with roots dating back to the 19th Century and instilled in the firm a legacy of client service, trust and foresight.

These traits are still integral to the business and have been instrumental in shaping the wealth management service we offer our clients today.

Personal service underpins positive client feedback

Meeting your individual investment objectives requires a high degree of investment expertise but also a superior level of client service.

We asked our clients about their experience with JM Finn and were delighted to learn that we are succeeding in our goal.

Client service legacy*

Trust

98%

Have trust and confidence in the individual who acts as their investment manager

Communication

95%

Are satisfied with the communication they receive from JM Finn

Confidence

96%

Have trust and confidence in JM Finn as a firm

Referrals

70

JM Finn's NPS† demonstrating a client's willingness to promote the firm

* An independent survey of 2,094 clients conducted in March 2019 by Savanta
† Net Promoter Score

What makes us the right partner?

Strength in depth

In a competitive field it is often hard to determine what makes a runner stand out. We know our strengths and we focus on them to ensure that our clients get what they are looking for out of a partnership with JM Finn.

Long term view

Thanks to being privately owned we do not have to make short term decisions about how we run the firm or manage your money, which means we have similar long-term horizons to those of our clients. Those firms that are directly listed have the challenge of prioritising the interests of shareholders and clients, which can be a distraction to the business.

Client first approach

It is easy to say but by having senior investment managers on the firm's management committee, each and every decision is made through the clients' lens. This is essential to ensure that, as we evolve the business, we do not compromise the high level of service for which we have become known.

Accessible

We do not believe a personal service should solely be a luxury for those with larger portfolios. With no stated minimum investment size our investment managers have discretion as to whether to take on a portfolio and for those investors just starting out, we have a choice of funds which offer a lower cost alternative.

Personal service

Our personal service starts with a blank sheet of paper and all our wealth planning advice is tailored to your specific circumstances. By not centralising our investment process we can ensure individual requirements are catered for.

Exceptional client service

And do not just take it from us. We surveyed our clients in 2019 and the results were exceptional, especially when put into the context of our peers.

Clear communication

A personal service begins with clear, concise and regular communication.

JM Finn has been at the forefront in servicing our clients. Our online capabilities, which include an award-winning app to view client portfolios 24/7, are central to communicating effectively with clients who wish to retain a personal relationship but also wish to make use of our digital services.

For those clients who prefer, we can place contract notes, valuations and other paperwork in a personal library within your online account. It is this ongoing development which typifies our focus on client service.

Building on a hard earned reputation

Reputations are built on trust and the ability to deliver on clients' expectations. To ensure we are on track we submit entries to some relevant awards and are incredibly proud of our achievements to date, which highlight the high quality of service we strive to provide.

Award-winning services

Gold Standard Awards

- Discretionary Fund Management 2018: Winner

City of London Wealth Management Awards

- Wealth Management Company of the Year 2019: Nominee
- Discretionary Wealth Management Award 2019: Nominee
- Best Discretionary Service 2018: Nominee
- Best Discretionary Service 2017: Winner
- Best Discretionary Service 2016: Winner

Goodacre Systems in the City Awards

- Best Wealth Management Interface 2019
- Best Online Development: Winner 2017 for JM Finn's client portal

Contact us

Contact us to learn how we can help build the future you want to see

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Investment involves risk. The investments discussed in this document may not be suitable for all investors.

The value of investments and the income from them can go down as well as up and investors may not get back the amount originally invested. This document is for information purposes only and has no regard for the specific investment objectives, financial situation or needs of any specific investor.

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