

JM FINN

Investment | Wealth

Personal Injury & Court of Protection



Court of Protection and Personal Injury

Investing for individuals in receipt of a compensation payment, as a result of injuries that they have sustained, ensures that the financial affairs of individuals are handled with the utmost care and diligence.

Our specialist service is designed to protect and grow the individual's assets, providing peace of mind to their families and those designated to oversee the funds. Put simply, investing can play an important part in helping funds provide for a lifetime of financial support. By investing the sum, it is possible to receive regular payments to provide the support needed, while still seeking to protect the real value of the funds from the rigors of inflation. Without investing, the value of the capital may well reduce over time as a result of expenditure needed for care and other costs as well as these costs increasing over time with inflation.

JM Finn's expertise in Personal Injury and Court of Protection

Led by Jonathan Taylor, we have a dedicated team that specialises in working to achieve the best financial outcomes for those who have been awarded personal injury settlements or are under order of the Court of Protection.

With over 20 years' of specialist experience, Jonathan and the team will work together with you and any solicitors you may have appointed, to achieve the best possible financial outcome for your beneficiary. Whether you are a trustee or a deputy, acting in a professional capacity, or working on behalf of a beneficiary, we understand the immense pressure the responsibility can bring when you handle financial affairs on behalf of the beneficiary.

Our specialist team are fully used to dealing with people who have no prior experience in being a trustee or deputy. Working closely with you at every stage, they will help you comply with your legal duties and act in the best interest of your beneficiary.



How we work with you

Whatever your situation, we always follow a rigorous process to work for the best possible outcome and ensure that you can easily comply with your fiduciary duties.

1.

Understand the situation

We would initially gather all of the relevant information about the individual including details of their assets and financial requirements for their own future.
2.

Devise an investment proposal

Once we have all of the information, we will then create a specialist investment proposal designed to best meet the individual's future needs and requirements. This will include details of how and where we will invest the funds, as well as anticipated returns and risk levels.

3.

Arrange a meeting

Once you have had a chance to consider our investment proposals we would have a meeting to discuss the proposals in greater detail as well as answer any questions that you may have.
4.

Set up the investments

If you would like us to proceed with the investment proposal, we would then begin to construct a portfolio specific to the individual's needs and requirements. Our wealth management service provides for portfolios to be set up and managed on a regular basis to find the most advantageous moment to begin the investments and take advantage of any market opportunities that may exist.

5.

Keep you regularly informed

As a specialist team, we recognise the importance of keeping you regularly informed of our progress in working to try to achieve your financial goals as well as providing invaluable market and portfolio updates. We will have regular meetings to keep you up to date with the progression of the portfolio as well as to note any changes in financial requirements. As part of our discretionary wealth management service, investments are regularly monitored to react quickly to market developments and to try to ensure that your financial requirements are continually being met.

Our investment process

Investments will usually be made towards the lower end of the risk scale – this means that the portfolio would typically have a higher composition of traditionally lower-risk asset classes such as government bonds or high-grade corporate bonds.

Our specialist team’s investment approach is to usually only take the level of risk required to achieve your financial requirements. This allows us to minimise the volatility and greater potential for loss associated with higher-risk investments, thereby reducing unnecessary stress for deputies and beneficiaries. Our goal will be to try to deliver both an income for your beneficiary to live on and to preserve and grow the original capital.

Our investment proposition

We specialise in discretionary investment management – investing to try to meet your financial objectives.

There are two different ways to invest with JM Finn – the Investment Management Service, and Wealth Management Service, both with the same award-winning personal client service that our firm is known for.

The JM Finn Investment Management Service

Offers a pooled approach to investing - meaning the money you are responsible for is collectively invested with money from other investors into a fund, which is managed by JM Finn’s fund managers. For clients with straightforward investment needs, the Investment Management Service is likely to be the best option as pooled investing is often much more cost effective than running an individually tailored portfolio.

The JM Finn Wealth Management Service

Is a bespoke investment service that is most suited to private clients, charities or trusts who have more complex wealth needs. As the portfolio is tailored to help meet your specific requirements, it allows you to add any specific investment mandates or restrictions into the portfolio.

About JM Finn

Our history dates back to 1946 when the company was founded by John Mendl Finn following the end of World War Two.

He instilled the values of strong client service, forward planning and a culture of trust – and while today we manage over £11bn of client assets, these traits are still at the forefront of our company ethos over 75 years later.

The firm's majority owner, Belgian private bank Delen, brings the financial stability of a top-20 Belgian company. Unlike many other wealth managers, JM Finn is not publicly listed, meaning that we are not driven by pressure to deliver shareholder returns – rather, our focus is on seeking to bring the best possible results for our clients over the long term.

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**Very knowledgeable,
always approachable,
very efficient and
very helpful.**

JM Finn client



What our clients say about us

We carry out a biennial client survey to ask our clients’ thoughts about JM Finn – and are proud that the results consistently reflect the high level of service we strive to achieve and trusted relationships we build through the years. We believe the biggest indicator of client satisfaction is that 3 in 5 of our clients have recommended us to others.

A snapshot of just some of the excellent statistics are included on the next page

SERVICE SATISFACTION

Would our clients recommend us?



Nearly

3 in 5



clients have recommended us to family or friends, including nearly

1 in 4



in the last 12 months.

TRUST AND CONFIDENCE

Our clients trust us to deliver time and again:



97%

of clients are satisfied that they have a personal relationship with someone they trust.



JM Finn's NPS* in 2023 was

28

58

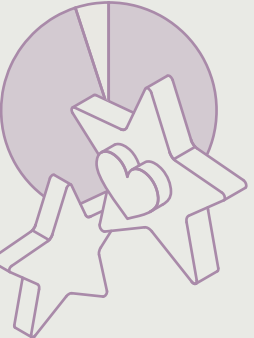
far above the industry average among UK wealth managers of 28.



* The Net Promoter Score (NPS) is a measure of our clients' willingness to recommend us.

95%

say they have trust and confidence in their Investment Manager at JM Finn.



95%

of clients have trust and confidence in JM Finn as a firm.



An independent survey of 1,671 clients within discretionary, advisory, execution only and Coleman Street Investments services was carried out by Savanta on behalf of JM Finn in 2023. Satisfaction rates in all questions are defined as the percentage of respondents who selected 7-10, where 10 is the highest level of satisfaction and 0 is the lowest.

Industry recognition for client service

The firm is also recognised through a number of industry awards, some of which are included here.

For a full list of our awards, please visit www.jmfinn.com/awards



Good Money Guide Awards

- Best Wealth Manager 2024
- Best Wealth Manager 2023
- Best Wealth Manager 2022



Private Asset Management

- Total Wealth Planning High net Worth 2025
- Client Service Quality 2022



City of London Wealth Management Awards

- Best Charity Investment Service 2025
- The FIS Award for Best Discretionary Wealth Management 2024
- The FIS Award for Best Discretionary Wealth Management 2023
- Best Charity Investment Service 2024

Get in touch

If you have any questions about how we can help build the future you want to see, please call

020 7600 1660

or if you would like to speak to your local office:

London 25 Copthall Avenue London EC2R 7AH 020 7600 1660	Bury St Edmunds 60 Abbeygate St. Bury St Edmunds Suffolk IP33 1LB 01284 770 700	Bristol 22-24 Queen Square Bristol BS1 4ND 0117 921 0550
York HQ Building Hudson Quarter Toft Green York YO1 6JT 01904 235 800	Winchester Regency House 13 St Clement St Winchester SO23 9HH 01962 392 130	

Email: info@jmfinn.com

Website: www.jmfinn.com

Important Notes

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.

JM Finn is a trading name of J.M. Finn & Co. Ltd which is registered in England with number 05772581. Authorised and regulated by the Financial Conduct Authority.

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Follow us on:



Registered Office:
25 Copthall Avenue
London, EC2R 7AH

020 7600 1660
info@jmfinn.com
www.jmfinn.com

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