



Why solicitors work with JM Finn

Personalised service

Dedicated investment managers act as a single point of contact, ensuring consistent, responsive communication.

Excellence in client service

97% of clients said they have trust and confidence in their investment manager, resulting in an excellent Net Promoter Score.

Heritage and expertise

Established in 1946, we have been managing assets for generations of UK families, charities and professional intermediaries.

Risk-based investment approach

Whether clients need bespoke portfolios, unitised strategies or specialist tax-efficient solutions, we offer a risk assessment at the outset of the relationship to enable clients to determine their attitude to, and capacity for, taking investment risk.

Trusted by professional intermediaries

JM Finn works closely with solicitors nationwide, providing clear reporting, consistent performance communication and support for complex cases.



Our services

Supporting you and your clients with clarity, expertise and truly personal wealth management.

For decades, JM Finn has worked closely with legal professionals providing investment and wealth planning services designed to complement your client relationships. Our discretionary and specialist services help solicitors offer robust, compliant and tax-efficient solutions across a wide range of client needs – from long-term savings and estate planning to complex investment structuring.



Wealth Planning

Comprehensive planning tailored to the needs of your clients and their families.

- Chartered financial planners offering guidance on pensions, retirement planning, intergenerational planning, IHT mitigation and cash flow modelling.
- Integrated with JM Finn's investment management teams to ensure portfolios reflect the client's full financial plan, with the investment manager as the primary point of contact for you and the client.
- Support for solicitors advising on divorce, probate, trusts and settlements.



Investment Management

- **Dedicated investment manager:** with longstanding client relationships.
- **Robust investment process:** Investment decisions backed by insights from a dedicated Investment Office, consisting of in-house researchers and experts across the firm who research and assess the viability of investments for portfolios. This includes conducting due diligence by meeting the companies and third-party funds in which we invest.
- **Bespoke investment service:** For clients with complex wealth needs such as existing tax considerations or holdings of sentimental value that clients wish to keep, JM Finn offers a bespoke investment service.
- Investment management services are suitable for:
 - ISAs
 - General Investment Accounts
 - JISAs
 - Offshore bonds.

Gilt Investing Service

For clients seeking lower risk, tax-efficient fixed income exposure as an alternative to holding cash.

- Direct investment in UK government bonds tailored to client objectives and time horizon.

Inheritance Tax Portfolio Service (Business Relief-based)

A specialist discretionary service designed to help mitigate potential IHT exposure using qualifying Business Relief investments.

Court of Protection/ personal injury

Our team have over 20 years of specialist experience in investing on behalf of Court of Protection and personal injury beneficiaries. We will work closely with you to achieve the best possible outcome for the client.

Probate

We offer support in dealing with a deceased estate via our probate services. Accessed via an investment manager, this service complements our wealth and investment propositions for lawyers.



Support for your clients – and your practice

We understand the pressures facing legal professionals. Our aim is to strengthen your client relationships by providing dependable investment expertise, timely communication and a service aligned to your professional standards.

For further information, please contact us.

The value of securities and the income from them can fall as well as rise. Past performance should not be seen as an indicator of future returns.

Follow us on:

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