

Frances Ford of Major Oak Wealth Management named as one of the UK's Top Rated Financial Advisers

OR

Local entrepreneur named as one of the UK's Top Financial Advisers

Clipstone based Financial Adviser Frances Ford has been named in Vouched For's 2019 Guide to the UK's Top Rated Financial Advisers, distributed in The Times on Saturday 23rd February 2019.

The listing was based on client feedback received via Vouched For, where Frances scored an average of 5.0 out of 5.0 across categories of Advice, Value and Service. Further verification included Frances' high level of professional qualifications and fee transparency.

Frances, who set up her business, Major Oak Wealth Management in March 2017, said 'It's really important to me that my clients are happy and value the service I offer. I started my business because I couldn't find a local firm to work for that offered what I do, so it's great to have my effort recognised and confirmation directly from clients that I am achieving what I set out to do.'

The report found that more than 18 million, people in Britain who could benefit from professional financial advice are not seeking it, according to research for the Financial Conduct Authority (FCA). A report for the regulator's Financial Advice Market Review in 2018 reinforces the sector's belief that working people across the UK – and not just the very wealthy – are in need of help with financial planning.

It found that of 46.5 million adults who had not obtained regulated advice, nearly 40 per cent had savings or investments of at least £10,000 "and therefore might have a need for advice".

VouchedFor.co.uk – a ratings site that lists financial and legal professionals, and helps people access the best available advice at all stages of life – has accumulated more than 100,000 verified client reviews and conducts its own extensive checks and monitoring. Its key objectives are to "demystify the advice landscape", help consumers understand the value of good advice and make them confident about seeking it. It's worth noting that the number of people receiving regulated advice on investments, pensions or retirement planning rose sharply from 3.2 million in 2017 to 4.5 million last year. But as the FCA report points out, that still only accounts for about one in ten UK adults.

Frances added "I am passionate about helping people understand the importance and potential savings receiving good advice can have on their investments, pensions and other financial planning. I think it is still sometimes seen as something only wealthy people need to take the time to invest in, but it's important everyone seeks professional advice to make the most of what they have – however big or small".

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1. Background on Major Oak Wealth Management – the business was set up in March 2017 by Frances Ford, as an Associate Partner Practice of St James’s Place Wealth Management. Frances is regulated by the FCA – ref no 773972. We help people to plan their financial futures, which can include mortgage planning, planning for retirement, investments, or ensuring financial security.
2. Background on the Vouched For’s 2019 Guide to the UK’s Top Rated Financial Advisers – a copy of the guide can be found here <https://v.fastcdn.co/u/269fe6a9/40589621-0-VouchedFor-2019-Top-.pdf>
3. A supporting report on Frances’ inclusion in the Guide is attached to the email
4. Logo & Photo you may wish to include:



Frances Ford



The paper from Sat 23rd Feb and the Guide