

MONEYAge

AWARDS

2023

Micro Wealth Management Firm of the Year: Britannic Place Financial Management



The judges applauded Britannic Place Financial Management's entry this year for its strong case studies, excellent client feedback and outstanding turnover and profits.

This year has been tough economically, but Britannic Place continues to excel in all it does, managing over £50m for just over 100 client "families". It focuses predominantly on executives or small business owners who are approaching, at or in retirement, and on average clients have around £500,000 in investable assets.

Recent client feedback showed that 100% of the firm's clients were satisfied with performance across the board and several accreditations have been received. Director, Steve Perera, has also recently received a 2023 Top Adviser Award from VouchedFor and has received a score of 4.9 out of 5. In addition, Britannic Place has also achieved a 2023 Top Rated Firm Award. This is the second consecutive year that it has achieved this and it is the only Top Rated firm in Worcestershire this year. To achieve this, the firm had to invite all clients to leave a review on VouchedFor and it had to achieve a certain, high level of ratings from these clients.

Britannic Place holds Corporate Chartered Status, demonstrating a commitment to a shared code of ethics, and a commitment to raising the profile and standards of the industry. The firm has also pledged to follow the nine statements outlined in the Financial

Vulnerability Charter, highlighting commitment to customers and providing them with excellence and trustworthiness in their financial planning service. Director, Steve Perera, is a Solla Retirement Advice Standard holder, meaning he has the necessary qualifications to provide both practical and emotional guidance for older clients and deliver effective advice for their specific needs. Britannic Place is also RQ Certified, meaning that it has gone through and been successful in a rigorous, independent assessment process.

Community is at the heart of everything the firm conducts. Britannic Place is a Gold member of the Hereford and Worcestershire Chamber of Commerce, sponsors of Worcester RFC, has supported Worcester Hockey Club's new multi-million building by sponsoring some of the bricks they used to build the new complex, and Perera has been a member of the prestigious Cellar Club in Birmingham, a leading group of financial planners, since 2014.

Perera has recently become an Education Champion through the My Personal Finance Skills initiative. As a result, he has presented workshops on personal finance skills to children at local schools.

The firm also prides itself on employee culture and progression, enabling them to develop as much as possible in their careers.

A huge congratulations must be given to Britannic Place for an outstanding entry and win in an extremely competitive category at this year's awards.

