Generation
FINANCIAL SERVICES

Knowledgeable, helpful and independent financial advice for you, your family and your business.

How can we help?

Our job is to help you feel confident about your finances – from your current position to planning for the future.

We work with businesses, families and individuals to take stock of what's happening right now, find out your goals for the future, and give you impartial, unbiased advice on the investments and strategies that are best for you.

For businesses, we focus on employee benefit schemes for staff such as pensions, life, disability and medical insurance and succession planning for Directors – offering expert management, clear reporting and a partnership that works for your business.

Our personal clients benefit from completely independent advice, access to products across the whole market and a long-term relationship that helps you plan your life with confidence.

Bespoke Employee Benefits Services

Attract and retain the best talent with comprehensive, affordable employee benefits for your business.

Financial Planning with a Personal Touch

Manage your wealth and personal financial planning with expert, independent financial advice and products.

Great reasons to work with us ...

We match you with a dedicated expert who will get to know your needs inside out, offering you a single point of contact with the added support of our team of specialists.

Unbiased advice, with no ties to any particular company and no restrictions on the range of retail products we can recommend.

We provide fixed fee quotes for all your projects. There are no hidden extras – we are completely transparent and will let you know the fee up-front.

We are one of a few companies in the UK that use Asset Risk Consultants (ARC) to provide Discretionary Fund Manager due diligence and their industry unique Peer Performance Reports. This means that we can provide clear metrics on the outcome of managers' portfolios. The service helps us select managers and benchmark performance by tracking our clients' investment returns against the ARC PCI*, all of which we use to strengthen investment experience for our clients and improve performance.

*ARC Private Client Indices
The PCI provides unique insight into the actual returns being generated by investment managers for their discretionary private client portfolios, based on real performance numbers provided by participating investment managers in five major currencies.

For further information, or to arrange a meeting, please send an email to enquiry@generationfs.co.uk or call 020 3728 7900

Hear from others

“Exactly what you need from a Financial Adviser, trustworthy and honest. The attention to detail and explanation of mortgages, pensions and financial investments is by far the best I have come across, and I have worked in the financial services industry for many years. I would highly recommend Generation Financial Services to everyone, as I have already to my friends and family.”

Mark Sutherland, Barclaycard Commercial Payments

“Generation Financial Services has provided us with an exceptional level of proactive support and professional and expert advice in a friendly, efficient and well explained manner. Their service provides a smooth transition away from our previous large, well-known firm of advisers. We have had fantastic feedback from employees and the Union. Generation Financial Services is a professional company with whom it’s nice to do business.”

Jan Toppari, Fortum O&M (UK)