

Grierson Dickens Limited is a fee based Chartered Financial Planning firm with a refreshingly different approach. Established in 1999 we work closely with a small number of high net worth clients to get to a position where they can confidently say these seven key things:

1. I, or someone I trust knows what I've got, where it all is and what it all means. I understand the interaction between what I expect to receive, what I need to pay out, and what I want to do over the rest of my life, so I've got context to make good decisions and not miss out on opportunities.
2. Things that need doing in connection with my money are done on time, efficiently and correctly.
3. I know that my assets are structured efficiently, and whilst possibly not perfect, they are aligned with what I am trying to achieve for myself, my family and society, and with my beliefs and values.
4. I know what and who I pay for managing my finances, and I am happy that it is fair, and that whoever is advising me has my best interests at heart and they are not conflicted because of the way they earn money from me.
5. When faced with major decisions and opportunities I have someone that I can turn to for advice who understands me, is responsive, efficient, experienced, highly qualified and will always act in my best interests
6. Somebody proactively encourages me to review my personal financial circumstances on a regular basis.
7. I know that someone has thought through what would happen in the event of a catastrophe and I have a plan for it.