

FINANCIAL PLANNING SPECIALISTS OF THE YEAR

Verus Wealth

Choosing a financial planner might seem daunting, but if you need help with any number of financial decisions it's definitely worth persevering because a good adviser can save you money and a lot of worry. Established in 2005, Verus Wealth is a firm of independent financial planners who can help with all that worry; offering investment, pension, protection and tax advice as an on-going service. Based in Dundee, the team is comprised of three advisers, two para-planners and two admin staff, and has approximately 300 clients throughout Scotland, but predominantly in Dundee, Angus, Perthshire and Fife.

The judges were particularly impressed by the impeccable level of customer service and high standards of professionalism and expertise. Through their team of friendly and engaging specialists, Verus Wealth makes financial planning an enjoyable and rewarding experience for every client. Verus is Latin for 'true, real, proper, right' and these are the words that represent the finance experts' approach, so you can be confident that all their recommendations are impartial and centred around your best interests. With the majority of their business hinged upon positive referrals, Verus places an emphasis on relationship-driven planning as opposed to commission or one-off, product-dependent sales.

VERUS
Wealth
Chartered Financial Planners

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Director Paul Lothian