JerseyWeb

FREE PRINTABLE LIST

Financial advisers and wealth managers in Jersey

20 local businesses and how to choose

Financial planners, wealth managers and investment firms with offices in Jersey, from advice for individuals to managers for institutions. Each listing links to the firm's own website. This page is general information, not financial advice.

JERSEY BUSINESS DIRECTORY

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20 businesses · Listings checked against each business's own website, 2 October 2026 · Live list: jerseyweb.je/directory/financial-advisers/

Financial advisers and investment firms in Jersey

Altis Partners
Systematic managed futures investment manager running diversified trading programmes and bespoke mandates for investors.
St Helier
altispartners.com

BWCI (Jersey) Ltd
Actuarial advice, pensions consultancy and employee benefit services in the Channel Islands.
Jersey
bwcigroup.com

Capital International
Asset manager running managed investment strategies and an online investment portal from an Esplanade office.
St Helier
capital-iom.com

Cazenove Capital
Investment and portfolio management for private clients, family trusts, charities and pension schemes.
St Helier
cazenovecapital.com

Concentric
Financial planning, investment and wealth advice.
St Helier
concentric.je

de Carteret Wealth
Financial planning on pensions, savings and investments for individuals and business owners, including advice for women.
St Helier
decarteretwealth.com
01534 860660

Evelyn Partners
Financial planning and investment management for private clients, trustees, family offices and charities.
St Helier
evelyn.com
01534 716850

Integritas Wealth Partners
Financial planning and wealth advice for clients in the Channel Islands.
Jersey
integritaswealth.je

Melville Douglas
Investment manager with teams in Jersey and South Africa, managing funds and portfolios for private and institutional clients.
Jersey
melvilledouglas.co.za
01534 881188

Nedbank Private Wealth Limited
Private banking, investment management and wealth planning with a Jersey presence.
St Helier
nedbankprivatewealth.com

Oakglen Wealth
Investment manager offering discretionary and advisory portfolio services to clients in Jersey and the United Kingdom.
St Helier
oakglenwealth.com
01534 789942

Quilter Cheviot
Discretionary investment management for private clients, charities and trustees, with an office in Jersey.
Jersey
quiltercheviot.com
01534 506101

Rathbones Investment Management International
Investment and wealth management services from Rathbones' Jersey office.
St Helier
rathbones.com

SaSo Strategic
Financial planning and investment management joined up in one advisory service, plus employee benefits.
St Peter
sasostrategic.com

Somerston Asset Management
Investment manager running multi-asset, equity, technology and growth funds for families and other investors.
St Helier
somerston-am.com

TEAM Asset Management
Independent asset manager offering discretionary investment portfolios and funds for international clients.
St Helier
teamassetmanagement.com
01534 281700

Titan Wealth
Investment management and financial planning for Channel Islands clients.
Jersey
titanwci.com

TreasurySpring
Digital platform letting companies, funds and charities place surplus cash in fixed-term products.
St Helier
treasuryspring.com

Trinity Hill Capital Management
Quantitative manager running automated derivatives trading strategies for institutional accounts.

St Helier
trinityhillcapital.com

Westminster Asset Management
Investment and wealth management services from Jersey.

Jersey
westminsteram.com

How to check and choose a financial adviser in Jersey

Investment business has to be registered

Under the Financial Services (Jersey) Law 1998, investment business covers dealing in investments, managing them on a client's behalf and giving advice on particular investments. Carrying it on in or from Jersey without being registered with the Jersey Financial Services Commission (JFSC) is an offence.

To check a firm, search the JFSC's register of regulated entities and filter by "Investment". Results show its licences and reference numbers.

What a firm must tell you

The JFSC's Code of Practice for investment business says a firm must:

- give you written terms of business, separate from marketing material, before the service starts or as early as it can
- show in writing that you were told all the fees and charges, as a money or percentage figure
- record your circumstances and objectives, and be able to show in writing that its advice suits you, including how much risk and loss you can bear
- explain the risks in writing, give a written breakdown of costs, and say which products any investor compensation scheme does and doesn't cover

Advisers can't take commission on advice to Jersey clients

The Code says firms giving investment advice must not take commission from product providers for advice to Jersey-resident retail clients, with some listed exceptions. So expect to pay the adviser a fee, and ask for it in writing first.

Pensions

gov.je explains the types of Jersey pension scheme, such as retirement trust schemes and retirement annuity contracts, but says it can't give advice on pension planning. For that it points you to a person or organisation regulated by the JFSC.

Making a complaint

Complain to the firm in writing first. If you have no final answer after 3 months, or you disagree with it, the Channel Islands Financial Ombudsman (CIFO) can look at it for free. It covers investment and pension firms and can award up to £150,000. The UK Financial Ombudsman sends complaints about firms in the Channel Islands to CIFO.

UK protection may not apply

The UK's FSCS covers firms authorised by the UK regulators, the FCA or PRA. A Jersey firm is regulated by the JFSC, so ask in writing which compensation schemes apply to your investment. The Code says the firm must explain this.

Listings are free and in alphabetical order. Jersey Web is not connected with these businesses unless a listing says so: check details with each business before you book. Guidance checked 14 November 2026.

Run a Jersey business?

Get your business listed free, or let us build you a website: builds from £100 and hosting from £20 a month.

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