

Why Momentum

Our Customers

Our imperative is providing the best service to our Customers

We provide customers with information and services that are accurate, thorough and timely. Our team is knowledgeable and well-trained, ensuring that our customers experience an unrivalled service. Above all, we value our customers and recognise that you are people, not statistics.

Our People

Ultimately, we are a people business

We always invest in personal development ensuring that Momentum people are well-trained, engaged, motivated, knowledgeable and personable, as well as cautious and vigilant. To go the extra mile for customers, you need the people who are fit for the challenge.

Our Knowledge

Our technical experience is multi-faceted and multi-jurisdictional

We support our advisers with a knowledge bank to enable them to help our customers invest without undue legislative or regulatory risk.

Our Solutions

We offer a complete solution to both UK expatriates and residents alike

With a multi-jurisdictional footprint providing comprehensive access to four jurisdictions means that we can always meet our customer needs. We believe in keeping our fees simple, well-priced and fair, providing a simplified charging structure for all of our products. Our dedicated business development team are here to support you every step of the way with a personalised service.

Our Governance

Robust governance and detailed procedures ensure your money is in safe hands

We will say 'no' when it is for the customer's benefit. Our cautious appetite to risk gives us a strong, well-structured foundation which is free from issues which challenge many other providers. We are fully regulated in all the jurisdictions in which we operate.