

Port Brae Wealth Management



ST. JAMES'S PLACE WEALTH MANAGEMENT

The Business

Port Brae Wealth Management provides personalised, face-to-face wealth management advice to individuals and businesses. They advise on building capital, managing cash and borrowings, and protecting wealth against risk. They are members of The St. James's Place Partnership which represent the award winning St. James's Place Wealth Management.

Port Brae offer a comprehensive range of wealth management products and services from companies within the St. James's Place Wealth Management Group and also from a range of carefully selected external organisations.

The Background

Port Brae was established in April 2008 by Michael McGovern and Stuart Foulkes when they opened their offices in Peebles in the Scottish Borders, they were joined by Mark McGonigle in May 2009 and have now opened a further office in Berwick upon Tweed.

Michael McGovern has worked in Financial Services since starting with the Bank of Scotland in 1987 progressing to a qualified financial adviser in 1996 and into wealth management from 2004. Michael studied at Heriot Watt University in Edinburgh while working for the bank and successfully completed his degree as a Member of the Chartered Institute of Bankers in Scotland (MCIBS). With extensive wealth management experience Michael has expertise in many areas of financial planning.

Stuart Foulkes has extensive experience and advanced qualifications in financial planning and wealth management. As a Partner of the St. James's Place Partnership Stuart has access to a wealth of expertise in all fields from investments to mortgages to tax planning.

Mark McGonigle is based in the Berwick-upon-Tweed office and has recently joined Port Brae after working successfully as a Financial Adviser with Halifax Bank of Scotland. After being recognised as one of the top HBOS Advisers, Mark accepted an invitation to join the St James's Place Partnership in early 2009. Mark provides bespoke financial planning to his clients and prides himself on providing a full Wealth Management service.

The Service

Port Brae specialise in meeting the financial needs of people who have created more capital, or who earn higher incomes than average, and whose circumstances may be therefore more complicated.

They provide a highly professional service delivering reliable and personal advice designed to suit individual requirements. Whether you are looking for advice on investments, inheritance tax planning, pensions or protection, they can find a solution tailored to your needs.

Michael McGovern, Partner said "Port Brae's emphasis is on developing long-term relationships with our clients to provide a trusted source of advice as their financial needs evolve over the years. "

Why Berwick WorkSpace?

Mark McGonigle, Partner said "We were looking for well equipped offices with good accessibility for our clients and a professional image for our business. We were extremely impressed with the excellent facilities available at Berwick WorkSpace.

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