



Andy Burns

Director of Chapel Wealth Management

Q&A

Meet Andy

I started my career in financial services at Barclays in 1997 and soon qualified as a financial adviser, working closely with private individuals and corporate clients, including parliamentary and global organisations. In 2006, I was approached to join AXA Wealth and was central to the launch of their award-winning Elevate platform. My depth of knowledge grew further when I joined Aegon UK to help build and lead a thriving wealth division.

In 2019 I joined St. James's Place, returning to my passion for delivering bespoke face-to-face holistic financial planning. As Managing Partner of Chapel Wealth Management LLP, a Partner Practice of St James's Place.

What was your perception of SJP before you joined?

Before we joined St James's Place, we had a similar perception to most IFAs. We considered SJP to be on their own, away from the industry and adviser community, built on a direct sales culture, with restricted products and high charges. We were far from reality.

What did your business look like before joining SJP, and what does it look like now?

Chapel IFA was a traditional adviser firm, ironically born out of a direct sales division of Prudential over 22 years ago. Chapel has built a strong brand and reputation in the Essex and Suffolk region, growing organically through referrals and recommendations from existing clients and working with professional connections.

Under the SJP partnership, Chapel Wealth Management is a well-established, multi-adviser business with a robust infrastructure and strong client proposition.

We are growing our Adviser capacity by working with the award-winning SJP Financial Adviser Academy.

Did SJP stand out to you compared to competitors? If so, how?

Aside from being part of a FTSE-100 company, the advice guarantee was essential, especially in the current advice arena. SJP had invested significantly in technology, launching a new platform, Bluedoor, providing a full range of products online with straight-through processing. The proposition is strong, with a range of tools and a compelling Trust suite, all underpinned by an outstanding investment proposition to meet all client's needs and circumstances. Coupled with excellent service and support, it made SJP stand out from the rest. SJP also supports our business growth strategy through their Financial Adviser Academy.

What has been the client feedback since you joined SJP?

We continue to receive positive feedback from our clients, specifically around the level of communication, and technology, be it via the online portal or app. The investment returns continue to be robust against the sector.

Where do you see your business in the next 5-10 years?

Chapel Wealth Managing will continue to grow, evolving and delivering excellent client outcomes. The business target is £ 100 billion AUM by 2030 which will be achieved through organic growth, acquisitions and increasing the number of advisers in the business.

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