Gordon Watson

Senior Adviser at SRB Wealth Management

Q&A

I am a 56-year-old Financial Advisor with 33 years' experience in the profession. I live at home with my partner Jennifer, 22-year-old son, Kerr and my 15-year-old daughter Isla. My main passions are spending time with my family at our holiday home in Spain and watching all kinds of sports. I also spend lots of time driving my daughter all over Scotland as she is a Competition standard Highland Dancer!

What was your background before SJP?

My first job in Financial Services was as an agent with Britannic Assurance working my way into a sales management position looking after 12 advisors. I was made redundant after 14 years and joined Norwich Union (Aviva) as a Senior Financial Consultant. I was then headhunted by Abbey National (Santander) and spent the last 17 years as a Senior Financial Planning Manager in the Wealth Division providing investment advice to High Net Worth clients of the bank.

Why did you decide to peruse a career with SJP?

During my time with the bank they gradually reduced their offering to the stage where we no longer offered Pension advice as well as the Investment offering being limited. I found myself in a well-paid job but "going through the motions" and slightly demotivated which is unlike me. Late 2020 there was a reshuffle and the bank offered a package to those who wished to leave.

Over the previous 10 years I had many meetings with members of the SJP recruitment team and had saw many of my ex colleagues join. Gary Welsh contacted me and over the months we built a great working relationship and Gary really opened my eyes to the opportunities available within SJP.

Has your life changed because of joining SJP, if so how?

Working within St. James's Place has certainly brought out the best in me. I do now feel valued, settled, and have a real sense of purpose that what I am doing changes clients lives. My partner Jennifer has commented that I have my enthusiasm for what I do back and look much happier doing what I'm doing.

I have found that working for SRB Wealth Management has opened my eyes in respect of full holistic advice, professional connections and dealing with business owners.

Does SJP facilitate progression in your role, if so how?

Yes, since joining both SJP and SRB Wealth Management have opened the door to having specialist authorisations in areas such as Inheritance planning and generally increasing my knowledge in all areas of advice. I have also received great support from my colleagues at SRB Wealth Management, ensuring that I settled in well and was comfortable with systems and processes.

I have found that working for SRB Wealth Management has opened my eyes in respect of full holistic advice, professional connections and dealing with business owners.

What advice would you give to someone thinking about joining SJP?

I would suggest that they explore the opportunity fully and speak to someone like Gary.

I would also recommend that they understand that SJP do really put clients at the heart of everything they do.

Last piece of advice would be to meet face to face with Practice owners like Steve at SRB who really do want the best people looking after their clients.

St. James's Place