



Clare Kennelly

Financial Adviser at Frost Wealth Management

Q&A

Meet Clare

I started my career working for Halifax, where I went on to qualify as a financial adviser at age 21. I began with Lloyds Private Banking in 2014, looking after and advising a portfolio of high-net-worth clients. I moved across to Schroders Personal Wealth in 2019 as part of the joint venture between Lloyds Bank and Schroders before leaving to join one of St. James's Place's Senior Partner practises, Frost Wealth Management, in April 2021. In my spare time, I enjoy yoga and have a love for travel – I currently have a plan to visit 40 countries by the age of 40!

What prompted you to explore a change in your career?

I liked that I would be working for a family-run practice with a personal approach but that we have the resources and backing of St. James's Place, which now has a significant market presence.

There is a lot of support and opportunity for advisers to grow and develop within St. James's Place.

What support at SJP has enabled you to succeed?

I like SJP's specialist departments and teams that advisers have access to that support you and your client cases. Being able to easily book a telephone meeting with a specialist to discuss your case who can advise you on how to serve your client best is especially helpful as a new adviser. It reassures you that you are doing the right thing.

The end-to-end guides are also easy to use to ensure you quickly follow each step of the advice process.

What support have you received from the practice that has helped you succeed?

Most of my first meetings with new clients have been held jointly with the partner in my practice which has been an excellent way for me to learn and ensures a warm handover for myself and our client. I have observed each team member in their day-to-day roles, which gave me a good understanding of the business.

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

I now have a better work-life balance; I am more in control of my working week, whereas previously, I had less flexibility. I am now also in a position where I can offer a much more comprehensive range of advice than I could in my previous role, which means I can help more of my friends and family with their financial planning, which has always been very important to me.

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

There is a lot of support and opportunity for advisers to grow and develop within St. James's Place, so take advantage of it and be ready to learn. This business enables careers, not just jobs. I only wish I had made a move sooner.