



Isle of Man Financial Advisers

The firms listed below hold Class 2 (3) & (7) permissions from the Isle of Man Financial Services Authority (“the Authority”) which allow the below companies to act as financial advisory firms and offer the provision of financial advice. Please note, a number of these firms also hold other regulatory permissions as issued by the Authority.

Pension advice is a form of financial advice and although the firms listed below have the required permissions to be able to undertake such services, some firms may have taken a business decision not to offer pension advice.

The below information has been taken from the Authority’s Regulated Entity Register (<https://www.iomfsa.im/register-search/>) and is current as at 17 January 2024.

Name	Trading Names
Barclays Bank PLC	Barclays; Barclays International; Barclays International Premier Banking; Barclays Premier Banking; Barclays Private Bank; Barclays Wealth; International Premier Banking
Blackford Financial Services Limited	
Blue Square Wealth Management Limited	Blue Square
Blythe Financial Limited	Blythe Financial; Blythe Wealth Management
Brooks Macdonald Asset Management (International) Limited	
Chartwell Financial Planners Limited	Chartwell Financial Planners
Chase Financial Services Limited	Chase Wealth Solutions; Chase Financial Options; Financial Options; Investment Options; Mortgage Options; Pension Options

Name	Trading Names
Edgewater Associates Limited	Edgewater; Edgewater Associates; Edgewater Mortgages; Edgewater Pensions
Hockney Stevens Investment Services Limited	Hockney Stevens Chartered Financial Planners; Hockney Stevens Pension Specialists
HSBC Bank PLC	
Independent Financial Consultants Limited	IFC
Investasure Financial Services Limited	
Investment Interest Management Limited	
JMR Limited	
LMS Partners Limited	LMS Partners; LMS Partners Investments & Retirement Planning
MAC Financial Limited	MAC Financial
Moore Dixon Financial Services Limited	
Osborne Financial Services Limited	Osborne Financial
The Royal Bank of Scotland International Limited	Coutts Crown Dependencies; NatWest International; NatWest; RBS International; Isle of Man Bank
Thornton Associates Limited	Thornton Chartered Financial Planners