

Sound Financial Welcomes

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Categories: Company

Announcement



Empowering
Success
Together

Introduction

Sound Financial Management Ltd is pleased to announce that we will be joining the Titan Wealth Group, an exciting step that marks the next stage of our growth and long-term commitment to delivering exceptional financial advice. We have received confirmation from the FCA that our change in control (CIC) to Titan has been approved, and we have gained regulatory approval from the Financial Conduct Authority (FCA).

Strengthening Our Position for the Future

Titan Wealth is a rapidly expanding UK wealth and investment group with approximately £44 billion in assets under advice and management and a nationwide adviser network. Sound Financial Management has grown significantly since its founding in 1997 and currently looks after nearly £640 million of client assets, supported by a team of experienced advisers, paraplanners and administrative staff.

Becoming part of a larger group will allow us to benefit from Titan's extensive resources, added expertise, and economies of scale – ensuring we continue to thrive in the years ahead. Titan Wealth has been steadily building its regional presence, and this acquisition will further strengthen its capabilities in the southwest of England.

Vision

To deliver exceptional, client-focused financial advice supported by Titan Wealth's scale, technology, and investment capabilities.

Mission

To remain independent advisers while enhancing our service through Titan's wider resources— offering better tools, stronger research, and improved client outcomes.

Putting Clients First

Placing clients at the heart of everything we do has always been central to Sound Financial Management, and this will not change. We will continue to act in your best interests at all times, and importantly:

We will retain our status as Independent Financial Advisers.

Titan Wealth has expressed a clear commitment to nurturing and growing our business while preserving the strengths that have defined Sound Financial for nearly three decades. Their leadership team has highlighted the expertise and dedication within our adviser group and the value this brings to their expanding regional network

Enhanced Services and New Opportunities

Enhanced Services and New Opportunities. Joining Titan Wealth will enable us to enhance the service you receive through access to:

A wider range of discretionary investment solutions
Stronger investment research capabilities
An improved online and technology-driven client experience
Broader in-house resources that strengthen our overall proposition

Thank You to Our Clients

We would like to express our sincere thanks for your ongoing loyalty and support, which have been integral to our success. We are committed to ensuring a smooth transition and will continue to keep you updated as the regulatory approval process progresses. If you have any questions, please do not hesitate to contact your adviser.

Looking Ahead

This is an exciting moment for our team, and we look forward to continuing to support you on your financial journey for many years to come – now with the enhanced capabilities of the Titan Wealth Group behind us.