



McCREA FINANCIAL SERVICES

McCrea Financial Services is a name that will be familiar to many in Scotland. One of Glasgow's biggest independent advice firms, it is a regular sponsor of rugby union's Glasgow Warriors and Partick Thistle football club.

The company engages many new clients from referrals and maintains a strong brand presence. Clients come from a variety of professions and backgrounds, and range from young professionals and the self-employed to retirees. As well as offering in-depth financial planning, the company has been giving specialist mortgage advice for more than 20 years. The business has recently launched DFM portfolios, including three ethical portfolio options.

In a recent interview with Scotland on Sunday, managing director Douglas McCrea emphasised how client rapport is crucial for proper planning, even when meetings need to be held via video.

'Relationship building is critical when it comes to giving good financial advice, because to know and understand your client's circumstances is vital,' he said.

The business has raised more than £500,000 for local and national charities. The firm holds a golf day and a race night, and the team regularly takes on challenges, including the Three Peaks and, in 2019, a combined trek around the Arran Coastal Path and along Cowal Way.

Something of an adventurer, McCrea plans to paraglide off the Isle of Arran. Scottish weather being what it is, his attempts to take the leap (about 30 so far) have been thwarted.

FUNDS UNDER ADVICE

£295M

FEE-EARNING ADVISERS

6

NUMBER OF CLIENTS

700 ADVICE CLIENTS

300 MORTGAGE CLIENTS