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London-based IFA Finura makes first acquisition

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JHA holds £90m in client assets.

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London-based financial planning firm Finura has made its first acquisition by purchasing IFA James Harvey Associates (JHA) for an undisclosed fee.

The acquisition of JHA has increased Finura's presence in the English capital as it begins efforts to build its name as a preferred choice for financial advisers looking to sell their firm.

JHA, founded in 1998, holds £90m in client assets and the company's founder James Harvey and administrator Jennifer Crane will both join Finura as part of the deal. Harvey said:

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"I have become increasingly aware of the need to develop a succession plan for JHA whilst having no immediate plans to retire. After a comprehensive search, Finura's genuine interest and concern for clients shone through in all my dealings with them."

Meanwhile, Finura founding director James Herman added: "We are delighted and proud that James chose Finura over several rival firms. James and his team bring over 30 years of financial planning experience, strong client relationships and an unwavering commitment to lifestyle and values-based planning; this is the beginning of an exciting new chapter for everyone involved."



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