




Smythe House

Tailored Financial Planning
for Discerning Private
Clients and Family Offices

Your Trusted Partner with
Over 60 Years Collective
Experience



W elcome to a world of tailored financial solutions designed exclusively for Private Clients and Family Offices. At Smythe House, we understand the unique needs and aspirations of both Private Clients and Family Offices, and we are committed to delivering a personal, curated service that empowers you to navigate the complex financial landscape with confidence. With Direct FCA Authorisation, we pride ourselves on our independence, being able to put you and your needs truly at the centre of our service.



Why Choose Smythe House

Experience Matters

With over 60 years of experience in wealth management, we have successfully guided countless individuals and families towards their financial goals. Our seasoned team brings a wealth of knowledge to the table, ensuring that your financial legacy is in capable hands.

Your Family, Our Priority

At Smythe House, we believe that you and your family is at the centre of everything. When you choose us as your partner, you become a part of our extended family. We are here to nurture your success and create a legacy that will endure for generations.

Personalised Solutions

Your financial journey is as unique as your family. We take the time to understand your specific goals, risk tolerance, and values, crafting a bespoke financial plan with exciting and innovative solutions that aligns perfectly with your vision.

Comprehensive Independent Wealth Management

Our holistic approach to wealth management covers every aspect of your financial life, from investment strategies to tax optimization, estate planning, philanthropy, where appropriate private ventures and more. We provide a 360-degree view of your finances, allowing you to make informed decisions.



How Smythe House Can Help

At Smythe House, we believe that personalized independent service is at the heart of every successful financial plan. When you choose us as your partner, you'll be supported by a team of experts who are with you every step of the way.

Your Strategic Financial Planner


Your private strategic financial planner will be your go-to advisor, responsible for understanding your unique goals and crafting a roadmap to achieve them. They are your trusted partner, ensuring your plan remains flexible and in alignment with your evolving needs.

Together Towards Legacy

As strategic financial planners; we are legacy builders. Our team is committed to helping you build a lasting legacy that reflects your values and aspirations, providing a foundation of financial security for generations to come.

Investment Specialists

Our seasoned investment team leverages their years of experience and market insights to build a diversified portfolio tailored to your risk tolerance and financial objectives. We offer a suite of services from our strategic partners, being totally independent we can choose the best offerings from the marketplace to suit your needs in both discretionary and advisory solutions.



Tax Strategists

Our tax experts identify opportunities to optimize your tax situation, minimizing your tax liabilities and maximizing your after-tax returns.

Estate Planning Experts

Our estate planning specialists help you preserve and transfer your wealth efficiently, ensuring a lasting legacy for your family.

Elevating Family Structures

We Guide the expert crafting of bespoke structures, including Family Investment Companies, Trust Structures, and Limited Liability Partnerships.

Philanthropic Services

We collaborate with you to meticulously blueprint, orchestrate, and enhance your benevolent endeavours, fostering a strategic and thoughtful approach to philanthropy.

Concierge Service

We're just a call away, whether your objectives are financial or transcend the financial realm, we are there as a trusted advisor to assist you at every step of your journey.

Exclusive Events

Our suite of exclusive events invite you to transcend conventional thinking and immerse yourself in intelligent market insights and exceptional experiences. Delve into Private Venture Capital, Family Wealth Planning, Estate Structures, M&A, Philanthropy and more.





How we serve you

Update & Review

Understanding what is occurring in your world, if there are any concerns or worries, or anything you aspire to achieve.

Goals & Milestones

Re-evaluation and assessment of your goals and milestones you are seeking to achieve and a sense check as to the success of your plan.

Strategy & Tactics

What assumptions and metrics are we using to manage and review your choices. Where appropriate to regularly review and monitor.


Review what is working and what is not working across your affairs.

Review your Income & Expenditure

Varying degrees of assessment of income and expenditure to ensure requirements are planned and met, and where appropriate ensuring liquidity is mapped.

Review Attitude to Risk

Understanding your risk tolerances and capacity for loss are up to date and are correctly assessed.



Review of your Investments

Review mainstream capital markets, mandates, performance, charges on an ongoing basis. Tactical and satellite positions considered and reviewed.

Reviewing cash management solutions

Where appropriate reviewing private markets for those investments made and those being considered.

Maximizing your Personal Allowances

- ISA Allowance
- Pension Funding
- Annual Capital Gains Tax (CGT) usage
- Partner / Spouse Allowance
- Charity & Donor Advised Funding (DAF)
- Venture Capital Trusts (VCTs)
- Enterprise Investment Scheme (EIS)
- Offshore Bond Withdrawals
- Annual Gift Exemptions

Review of your Tax Positions

Monitor and review your tax affairs and review from Income and Capital Gains tax positions. Where appropriate conduct a month 10/11 tax year assessment for proactive tax planning.

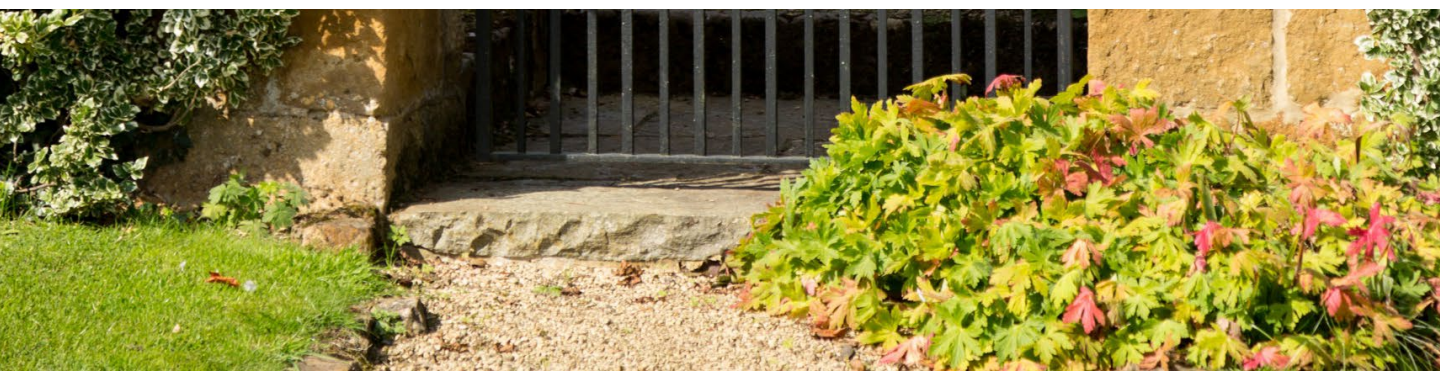
Monitor and review corporate tax planning structures such as Family Investment Companies.

Review of your Protection Requirements

Assessing adequate protection is maintained and where appropriate reviewed for on-going assessments.

Review of your retirement plans (pre and post retirement)

Review of the retirement assets both in accumulation and de-accumulation phases – ensuring adequate risk assessments and comparisons for secure income are reviewed on-going.



Estate Planning / Asset Protection

Review current wills, trusts, covenants and letters of wishes.

Inheritance Tax Calculations & Planning

Reviewing the liability, the potential need to balance the gifts over lifetime, and recording to ensure that a comprehensive set of records are set aside.

Lasting Power of Attorney (LP)

Ensuring up to date and registered.

Care & Later Life

Assisting with planning, solutions and communications associated to Care at both home and Retirement and Nursing Homes.

Philanthropy & Charity

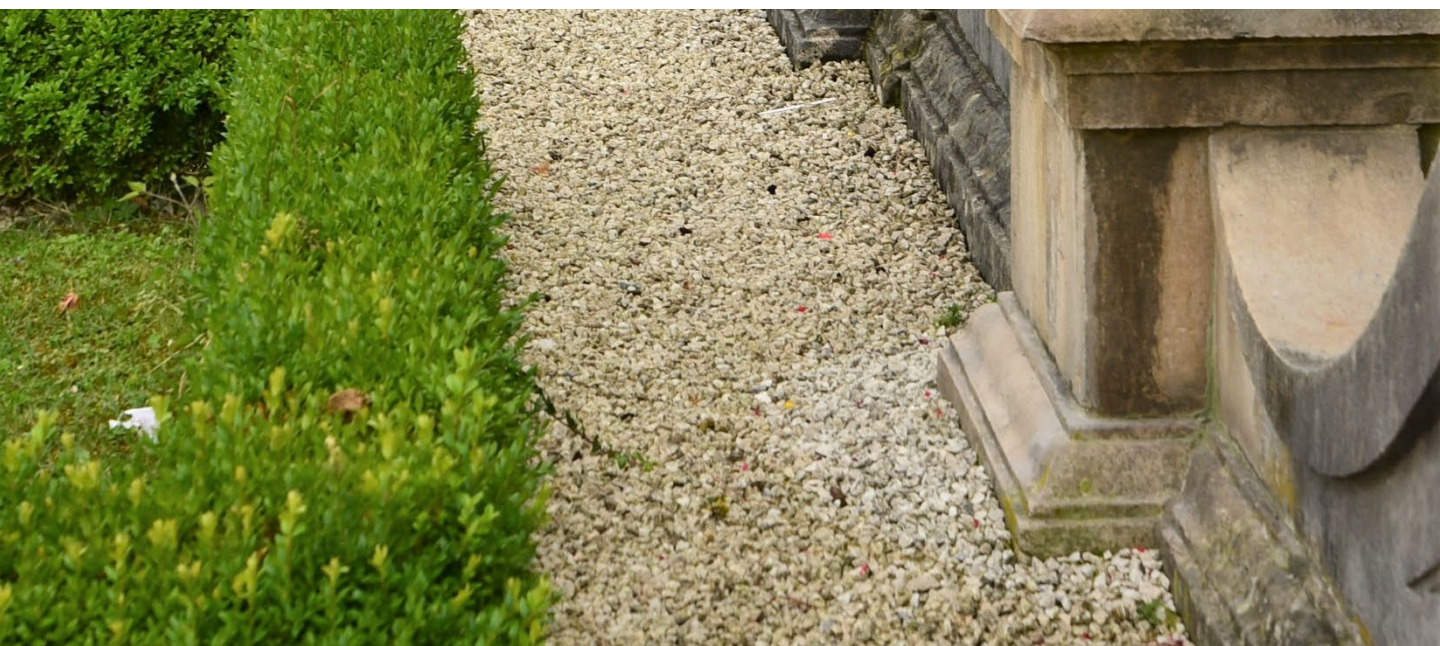
Assisting with your charitable giving both in your lifetime and where appropriate, after. Guidance and support in the various components of running your own charitable affairs, including DAFs.

Let's remove the hassle service

Clear out your files and help you manage and control your data

The Personalized Service

Assisting with family meetings, family governance and education across the family tailored to your bespoke needs



Meet Your Dedicated Team

Smythe house is part of the Oberon Group – a financial boutique comprising three divisions: Investment Management, Wealth Planning and Corporate Advisory & Broking. The company's shares are listed on the Apex segment of the AQSE Growth Market.





EDWARD GALWEY

Director & Strategic Financial Planner

Edward graduated from Southampton University in 1996, with a BSc in Economics and Politics. He entered the financial services industry that year where he worked for various financial services companies. During this time, he obtained his Advanced Financial Planning Certificate. In 2012 he set up Smythe House Limited, where he concentrated on building a solid database of professional and retail clients. His management role has allowed him to develop his own ideas and investment opportunities, whilst building ties with other service providers, never deviating from his sole belief of client servicing, which is the fulcrum of the company's ethos. In 2018 he integrated Smythe House into the boutique investment management firm Oberon.

Since then, the firm has continued to grow from strength to strength, to become the group's core financial adviser. During his spare time, Edward likes to run, enjoys cooking and is an avid follower of the English Test Cricket team.



ADAM YOUNG

Director & Strategic Financial Planner

Adam joined Smythe House at the start of 2024. With a stellar reputation and an impressive accolade as the 2023 'Financial Planner of the Year' by the Enterprise Investment Scheme Association (EISA) and runner up in 2022, Adam brings a wealth of experience and expertise to the Smythe House team.

Throughout his extensive career in financial services, Adam has cultivated a loyal client base, earning their trust through years of successful collaboration. From his early days at Barclays to managing his own business, Dragonfly, and later co-founding Jarrovian Wealth, Adam has consistently demonstrated his commitment to delivering exceptional service and tailored solutions to his clients.

At Jarrovian Wealth, Adam led the Private Office division, overseeing the financial planning affairs of over 150 high-net-worth families. His ability to build strong relationships with clients is renowned, and his approach is characterized by providing sound and innovative advice to help clients achieve their financial goals.

One of Adam's key strengths lies in his expertise in working with scale-up businesses and founders contemplating business exits. He offers perspective, clarity, governance, and education to guide them through crucial financial decisions, ensuring they are well-equipped to navigate the complexities of their financial journey.



KELLY MORGAN

Head of Client and Strategic Relationships

Kelly Morgan joined Smythe House in the role of Senior Relationship Manager at the start of 2024. With over 12 years in financial services and wealth management at UBS, HBOS and Munich Re as well as a successful tenure managing her own Wellness Business in Europe, Kelly's strength lies in client relationship management, where her motivation and organisational prowess shine brightly. Her track record speaks volumes, demonstrating her ability not only to maintain strong client connections but also to forge new opportunities and tailor solutions to meet their evolving needs. At Smythe House, Kelly plays a pivotal role in ensuring a seamless and exceptional client experience.

Having previously worked with Adam Young at Jarrovia Wealth, and with a background spanning both financial services and wellness industries, Kelly brings a unique perspective to her role, enriching the suite of services offered by Smythe House and her blend of expertise, unwavering dedication, and genuine passion for nurturing meaningful relationships makes her an indispensable asset to the team.

Kelly specialising in putting the client at the heart of the business, curating solutions that are the perfect fit for our discerning clients. She sees her role as the glue across the business. When not working, Kelly can be found playing with her young daughter in Paris and diving into myth and historical sites when possible. She also loves Chess.



DANNY CLEMENTS

Lead Paraplanner

Danny graduated from the University of Essex with an honours degree in Accounting & Finance and has spent close to 17 years in the financial planning industry, most recently being responsible for advice curation for a practice with 10 advisers, ensuring the ideal solutions were reached for each individual client.

He is very experienced in all areas of retirement planning, as well as specialising in meeting clients' Tax Planning and Inheritance Tax Planning needs. He also has extensive experience working with Professional clients, through his previous roles, and is very experienced in the use of cashflow modelling.

In his spare time, Danny loves to travel, visiting around 65 countries and territories so far. He is also a very keen sportsman, regularly playing golf, football and cricket, attending fixtures/events where he can.

At Smythe House, Danny manages the suitability report-building process, utilising his vast experience to provide top quality service. He also manages the investment research committee.



BEN BUTLER

Strategic Financial Planner

Ben Butler is a qualified Strategic Financial Planner with experience in both small and large financial advisory firms. Specialising in estate planning—from immediate needs to long-term strategies—Ben’s work aligns perfectly with Smythe House’s family office approach, providing comprehensive guidance for multiple generations of a family.

He firmly believes that building generational wealth is not about material gain but about creating greater choice and freedom in how we live our lives. To support this, Ben uses technology-driven tools such as cash flow modelling to help clients visualise and plan for their financial futures. His collaborative process is grounded in understanding each client’s personal circumstances and aspirations, then adapting his work to meet their unique goals. By working hand in hand with Smythe House’s expert team, he ensures every client benefits from a broad range of specialist knowledge.

Away from the office, Ben holds a season ticket for his favourite football club, follows Formula 1 avidly, and enjoys clay shooting. He has also dedicated over a decade to volunteering with Guide Dogs, raising and preparing future service dogs for visually impaired.



BELLA FARRELL

Client Services Associate

Since joining Smythe House in 2024, Bella has progressed to Client Service Associate, driven by her genuine commitment to delivering excellent service and care for our clients. In her role, Bella plays a key part in day-to-day client servicing, supporting project implementation and preparing monthly valuations to ensure clients receive timely, accurate and dedicated updates throughout the entire process.

Prior to joining Smythe House, Bella completed A-levels in Psychology, Criminology and English. After leaving school, Bella took on a full-time role as a restaurant supervisor, managing a small team where she had been working whilst completing her studies. She then travelled to Bali in order to volunteer and help with the construction of a school and a turtle conservation in Nusa Penida. Outside of work, Bella enjoys reading, Pilates, and travelling—always looking forward to her next adventure.



YULIIA HORBUNOVA

Technical Administrator

Yuliia started an internship at Oberon Investments, (sister company to Smythe House), in November 2023, then joined Smythe House in February 2024 and began working as a Technical Administrator in May.

Yuliia graduated with Honours in her degree in Finance, Banking and Insurance, and later gained a Master's degree in Banking, scoring more than 90% of the overall score in both degrees and won a double scholarship. She is currently completing an Accounting course at Southampton City College.

Yuliia previously worked as a credit specialist in both a microfinance company and in a bank. At the age of 13 she decided that she wanted to work in the financial sector, and she is bringing her dream to life at Smythe House.

Yuliia is originally from Ukraine and came to the UK two years ago. Yuliia enjoys communicating with different people, loves to discover something new and enjoys new challenges. Outside of her rewarding work she loves keeping fit, painting and reading, especially English authors. Yuliia enthusiastically began her new role, compiling monthly valuations, and doing technical research and is excited about new career opportunities and learning from the experienced professionals at Smythe House.



FLEUR BLOOMFIELD

Financial Administrator

Fleur joined the Oberon Group in September 2023 as a receptionist before moving to Smythe House as a Financial Administrator earlier this year to pursue her interest in developing her financial management skills.

In 2022 Fleur left Godalming College in Surrey where she studied Psychology, Sociology and Business. After finishing her A Levels, she went travelling around South-East Asia where she visited Thailand, Vietnam and Bali.

Outside of work, Fleur is an active member of the Cranleigh Hockey Club, where she plays competitively. In her leisure time, she also enjoys playing tennis and squash as well as going to the West End to watch musicals.

At Smythe House, Fleur provides administrative support to the Advisers, gathering information on client's assets, assisting with valuations and providing the first point of contact for clients.

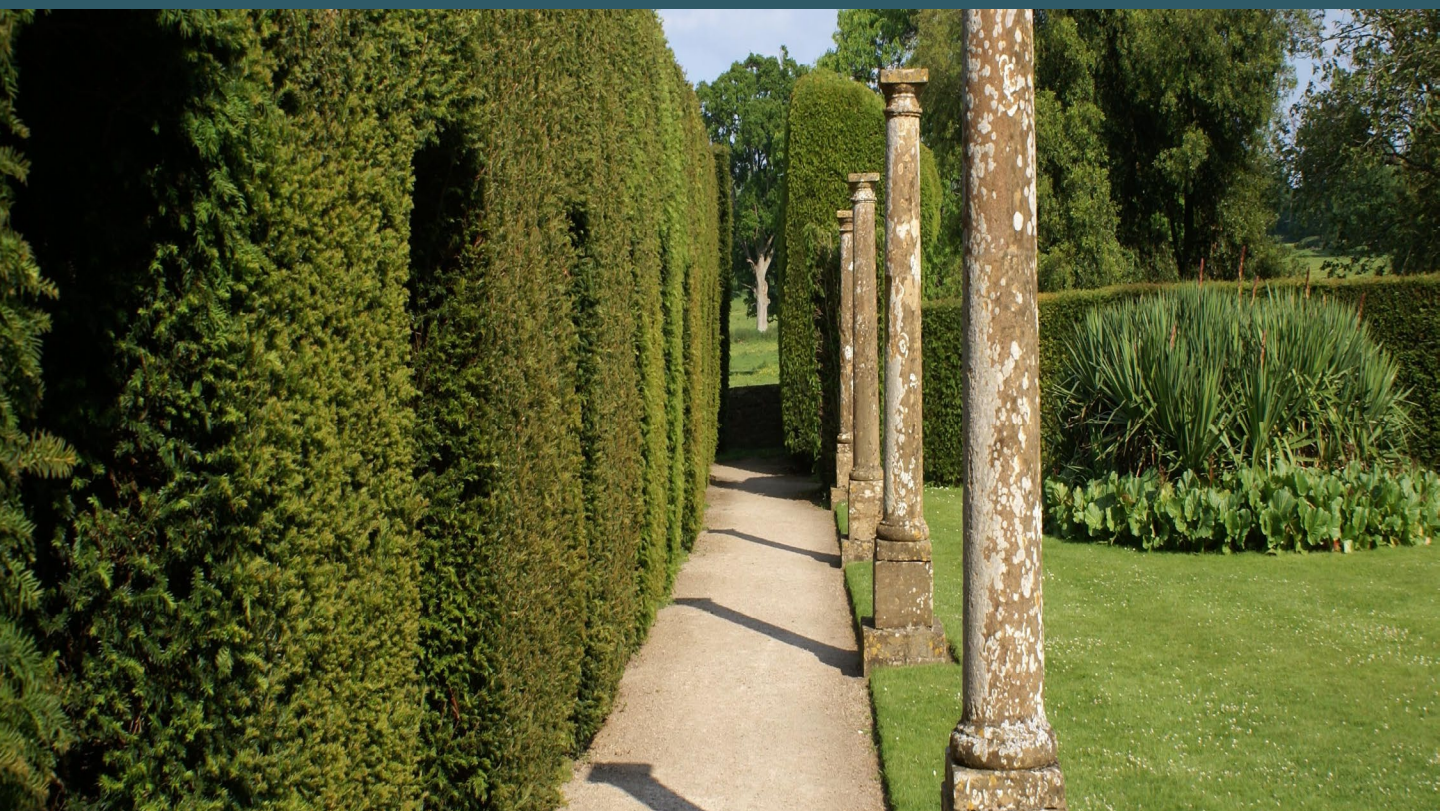


LOUIS LISTER

Financial Administrator

Louis joined Smythe House as a Financial Administrator Intern in 2025 to pursue an interest in the financial planning sector. Louis provides back-office support to the team, learning and shadowing his team members, as well as helping on specific projects.

Prior to joining Smythe House, Louis completed his BSc in Accounting and Finance from the University of Reading in 2024 and continued his interest in sport by playing hockey for his university team. Following his degree, Louis worked in hospitality in order to finance a year abroad. Whilst travelling he visited seven different countries, spending the most time in India, Thailand, Vietnam and Australia. During his travels, he enjoyed the culture and cuisines, developing a particular interest in Thai and Vietnamese cookery. Outside of work, Louis is a keen sports fan, following both test cricket and Southampton Football Club passionately.





A Final Word

At the end of the day, you're smart and savvy and we respect the need for transparency. When you join us, not only are you accessing highly curated service with innovative solutions but you're also getting a good deal:

- ✓ Save on management fees and access competitive rates
- ✓ Exclusive access to exciting solutions not available on the general market through our specialist partners
- ✓ Cash flow forecasting and shortfall review – understand your cash flow and plan effectively
- ✓ Full Annual Review – a comprehensive 360 review of your finances and how to get them to work harder for you
- ✓ Six-month review and discussion – regular discussions to address any changes in your financial situation or goals
- ✓ Six monthly investment valuations – stay updated on performance of your investments
- ✓ Trust and Estate Planning review – access efficient ways to plan the best for your family's legacy
- ✓ Investment review – in-depth analysis of your portfolio
- ✓ Financial planning report – receive a comprehensive report outlining your financial plan
- ✓ Tax planning - optimize your tax strategy to minimise liabilities
- ✓ Access to our wealth of experience at your fingertips, we are just a phone call away

Smythe House is authorised and regulated by the Financial Conduct Authority – 583142. Smythe House is part of the Oberon Investment Group plc and is a company registered in England & Wales registered number 07088807. Registered office : 6 Duke Street St James's, 2nd Floor, London, SW1Y 6BN. Smythe House deals with Retail Clients.

The value of your investment can go down as well as up and you may not get back the full amount you invested.



Get in touch

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