



Portfolio Financial Consultancy Ltd has been enormously successful since Founded in 1999 by Christian Roche, following the closure of Royal and Sun alliance in Cardiff & Swansea.

The expansion of the group was strengthened when Paul Pelopida became co-owner with Chris in 2002, following the client acquisition of F R Ball Financial Services, who were based in Abergavenny , where Paul very successfully ran that operation.

Chris & Paul have worked together in Financial services since 1991, firstly with AMP Pearl then Royal Sun Alliance and have been able to build on a wealth of knowledge and experience from different roles within the industry. As a result, bringing together the strengths of both individuals to create a business that is very unique in its approach to financial advice.

We have presence throughout the whole of South Wales and the West, with thousands of satisfied clients and we manage in excess of £200million of our client's investments.

Proof in itself of the exceptional standards provided

The company has built on its success in respect of the valued clients who have remained loyal for many years due to the high standards and exceptional service they have experienced. Our clients have grown the business by their own wealth expansion and by their recommendations to other like minded individuals; Knowing with the peace of mind that their family / friends and colleagues will be treated in the same professional and efficient manor.

The knowledge and experience of our advisor team, along with the dedication and commitment of the administration staff in both offices are fundamental in providing a 1st class service to our clients.

We believe in giving commitment to our clients and to deliver what is expected of us.

We have invested in the most up to date technology and highly experienced staff and are therefore able to deliver our promise of - "Efficient and Productive Money Management" for all involved in the relationship with our company.

