McMurtrie Wealth Management Ltd

Central to everything we do is enhancing your wellbeing. We achieve this through building strong relationships and financial education.

Enhancing Your Wellbeing

We at McMurtrie Wealth Management are driven by enhancing your wellbeing. This is key to what we do and what the company stands for.

We believe sighing can be good for you! That is why our aim for this first meeting is for you to breathe a sigh of relief!

We all have goals and hopes for the future. It is about making sure we are on the right path towards achieving those goals. We all know finances are important and McMurtrie Wealth Management understands that money considerations can niggle away at you. You know you should do something about them, but it is easy to push to the back of your mind. Life gets in the way.

We hope that by having this meeting, you will achieve greater peace of mind and a sense of relief in knowing that you have started to plan to reach your goals and take control of your future.

To ensure we always have your best interests at heart it is essential for us to understand what is important to you and why it is important to you.

Our role is to help our clients, their families, friends and colleagues. McMurtrie Wealth Management has gone from strength to strength based on a foundation of client satisfaction and recommendation. We have achieved this by building strong relationships in which our clients feel comfortable and valued. In return, our clients trust us to help them, their families, loved ones and the people closest to them.

Building Strong Relationships

Financial advice is not just about today. As time goes by your circumstances and goals will change. It is really important that everything we put in place today remains the right thing for you and your family in the future.

Even small changes can have a big impact on what you are trying to achieve. When making decisions in the future we will take account of your wider circumstances, making sure your wellbeing is at the heart of everything we do.



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Financial Education

We believe that knowledge is power and that everyone should get financial advice no matter their age or circumstances. Money management is generally not something we learn about at school; it can be daunting, complex, and full of jargon.

It is our mission to make all things finance as simple as possible and easy to understand. We want to create an environment where you feel comfortable to ask questions and gain a real understanding of your financial circumstances.

Meet The Team



Abby McMurtrie
BA(Hons) LLB Dip.L.P. FPFS

Role in the business? Fellow and Chartered Financial Planner. My role is to enhance your wellbeing.

If I could be an animal I would be? A hippo! … Ask me why later.

My favourite food? Agh! This is a tough one. I probably eat Italian most … yum. But also love Mexican food.

Dream destination? Antarctic.

Secret superpower I wish I had? The ability to pause time.

Who would I invite to a dinner party? The cast of Schitt's Creek.

When I grew up I wanted to be? A Secret Agent.

Louise Norman
DipPFS



Role in the business? Financial Planner. My role is to support you to achieve your goals.

If I could be an animal I would be? A lion, despite its size, it is graceful and calm. Lions are also very sociable within their pride, just like me.

My favourite food? My favourite food is tapas. It's impossible for me to pick just one favourite, and tapas reflects that perfectly. Although, I do love a roast dinner!

Dream destination? Africa, for a safari and its vibrant culture. It would be the perfect place to combine adventure with relaxation.

Secret superpower I wish I had? To see into the future.

Who would I invite to a dinner party? Tina Turner. I'd love to hear how she overcame challenges as she was such a strong, inspiring lady (and who wouldn't want to hear her sing again).

When I grew up I wanted to be? I wanted to be a Social Worker. I also had a hidden desire to be a superstar DJ, it just looks so fun!

Tania Ironside
St. James's Place Accredited Partner Support Specialist



Role in the business? Client Servicing Manager. My job is to take care of you!

If I could be an animal I would be? A dolphin, they always look like they are having a ball bobbing in and out of the water.

My favourite food? Mexican – anything in a wrap or taco, layered with cheese and I'm sold.

Dream destination? Bali or Maldives, both look so picturesque and are a different pace of holiday than I usually go for.

Secret superpower I wish I had? Teleportation.

Who would I invite to a dinner party? Muhammad Ali – I find him so interesting and motivational. He lived such a full and varied life with his sport, religion and activism, and was such a powerful speaker. I think he'd be a great addition to the dinner table.

When I grew up I wanted to be? A Child Psychologist.



Ted McMurtrie

Role in the business? Office Manager. My role includes making sure everyone has regular fresh air breaks and ensuring the wastepaper is suitably shredded.

If I could be an animal I would be? I am happy as a dog. After all, it's a dog's life.

My favourite food? Bonios.

Dream destination? Anywhere with a beach.

Secret superpower I wish I had? Opening the treat cupboard.

Who would I invite to a dinner party? I would rather have a play date.

When I grow up I want to be? A cat! … Just kidding.

About The Business



A wise person once said do what you love, and you will never work a day in your life; this is certainly true for Abby. Before transitioning into a Chartered Financial Planner and Business Owner, Abby trained and qualified as a solicitor where she spent several years honing her craft.

As a qualified solicitor Abby enjoyed building personal relationships with clients as well as helping them to solve problems. Solicitors often work long and unsociable hours and it was during this time that Abby realised the importance of having the right work life balance. She decided it was time for a change.

Abby looked at what she loved most about her job and realised that creating meaningful relationships and helping people achieve their goals was what she appreciated most. With that in mind, Abby started her journey with St. James's Place in 2017 and that is when McMurtrie Wealth Management Ltd was established.

Since then, McMurtrie Wealth Management has experienced exceptional growth. This has occurred as a result of Abby's philosophy of not only understanding what is important to our clients, but also why it is important. Adopting this approach has ensured that McMurtrie Wealth Management always has its clients' best interests at heart.

The Service We Can Offer You

- Regular face-to-face forward planning meetings where we will:
  - review your goals and objectives;
  - review your investments and make any necessary changes;
  - help maximise your tax allowances; and
  - encourage and listen to your feedback to ensure we maintain our exceptional standards.
- Correspondence and literature that is clear and easy to understand.
- Availability to speak on the telephone or via email between forward planning meetings to discuss any financial matters that are important to you.
- Regular communications ensuring you are kept fully informed of how your money is being managed.
- Regular financial communication tailored to you and your interests.

But Don't Just Take Our Word For It …

"Abby offers a personalised service which is professional yet friendly. She fits appointments around our busy lives and is very easy to talk to. Abby is very approachable and explains things very clearly without making you feel stupid. We feel confident in Abby's advice and would not hesitate recommending her to others."
Joyce Horsman, Glenfarg

"Abby is knowledgeable, approachable and is very client focused. She understood exactly what our needs were and delivered solutions which didn't only meet but exceeded our expectations. We would definitely recommend her."
Helen-Anne, Solicitor, Clackmannan

"I would recommend Abby's financial advice and services. Her advice is always clear and concise and she takes time to explain things thoroughly, recommending the best option to fit my circumstances. Abby is great at keeping in touch and proactively managing my financial matters. It is definitely worth speaking to her today."
Alison, Solicitor, Edinburgh

"Abby has always been extremely professional, easy to communicate with and explains everything clearly. She clearly puts her client first and goes the extra mile to ensure their needs are met. I have already recommended her to several people."
K Turner, Kirkcaldy

"Abby provided excellent support in helping me amalgamate my pensions. I had been putting it off for ages, then met Abby and she effortlessly took this off my hands with a high level of professionalism. I fully trust my pension is now in good hands for my retirement."
Alison Cairney

"Abby was extremely helpful and reliable when providing me with advice etc. I have been working with Abby for over a year now and communication is top notch, she also always has time to explain things and is never pushy with trying to sell. Highly recommend."
Sam Dyer, Property Manager, Dunfermline

"Working with Louise at McMurtrie Wealth Management has been such a positive experience. They really take the time to listen and understand my personal circumstances, and their advice is always clear, practical, and easy to follow. I've felt supported every step of the way and completely confident in the decisions we've made together. It's reassuring to know my finances are in such capable hands – I'd happily recommend them to anyone."
Fiona McNorton

"I have so far been delighted with my dealings with McMurtrie Wealth Management. The nature of my investment was a little complicated and I'm extremely grateful to have had the advice and help provided by Abby so that I could make the right decision for my circumstances. Abby's knowledge is fantastic and, just as important, she is able to explain everything in an easy to understand manner. I would have no hesitation in recommending McMurtrie Wealth Management to anyone looking for investment advice."
Mandy Mathieson, Edinburgh

enhancing your wellbeing

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Financial Planner Chartered

Associate Partner Practice
St James's Place