

Why choose Octopus Money?

We're working with advice businesses across the UK who are struggling to serve clients with lower levels of assets. We know that all of your clients deserve an incredible experience, but capacity can mean that there are clients who might be better served elsewhere. That's where we come in.

Our Brand

We count ourselves lucky to run a brand that customers already know, love and trust. We're currently in about 1 in 4 homes and almost everyone in the country knows who we are.

Our Values

We're proud to be a certified B-corp, meeting the highest standards of social and environmental performance, transparency and accountability. We believe that *how we behave* is just as important as what we do. That's why we're passionate about using our might and our money to solve society's biggest challenges – including closing the advice gap.

Our Financial Strength

We're part of Octopus Group, trusted to manage over £13 billion on behalf of investors across the UK.* We're a private business (and always will be) and we're fortunate to have access to cash on our balance sheet. That means we can think longer term than most and aren't constrained by short-term shareholder pressure.

Our Operating Model

With a team of over 50 customer-facing coaches and advisers – and growing – we've built an operation that can serve thousands of clients in a more cost-effective way.

Our Target Market

We've built our service and methodology from the ground up to serve a different segment from the rest of the financial advice market: smaller clients with simpler circumstances. That means we can work hand-in-hand with partner firms like yours to complement the amazing work you do for higher value, more complex clients.

Our Customer Promise

We believe in keeping the bar high for customer experience and quality of care. Having access to a real person, who really understands and cares about you, is one of the most important aspects of advice. At Octopus Money, every client gets a dedicated planner, who works with them 1-on-1 to explore their goals, build a cash-flow forecast and be on call whenever they need. While our technology takes care of the regulated advice, 1-to-1 support is at the heart of our proposition. We're proud to be rated 4.8 out of 5 stars on VouchedFor and "Excellent" on Trustpilot.

Our Customer Pricing

We're passionate about fair and transparent pricing. Our all-in fees start from 1.15% – including advice, investment management, platform and funds – and customers are free to leave whenever they choose, with absolutely no exit fees or minimum terms.

*Octopus as at 31 December 2023 – Funds Under Management data includes undrawn commitments, funds under advisory mandates and funds monitored. It also includes funds under the management of Octopus Renewables Limited