

Top 100 Financial Advisers

Rank	Company	June 2018 AUM invested in retail investment funds (£m)	Number of CF30 designated professionals	Year founded
1	Tenet	2,900	526	1967
2	JLT Group	400	57	1960
3	Mazars Financial Planning Ltd	890	31	1940
4	Kerr Henderson Group	660	10	1962
5	Wilfred T Fry (Personal Financial Planning) Ltd	240	22	1898
6	Quilter PLC	29,000	2254	1845
7	Raymond James Group	2,500	142	1962
8	Brewin Dolphin Ltd	10,000	430	1762
9	Foster Denovo	1,600	82	2005
10	Tavistock Group	570	166	1975
11	Wingate Group	300	13	1970
12	Beckett Investment Management Group	500	11	1988
13	Gibbs Denley Group	500	10	1990
14	Helm Godfrey Partners Ltd	410	29	1990
15	PI Financial Ltd	220	45	1991
16	Independent Financial Strategies Ltd	360	11	1983
17	Lovewell Blake Group	200	8	1858
18	Westminster Wealth Management LLP	250	33	2000
19	True Potential Group	690	433	2007
20	St. James's Place Wealth Management Plc	97,000	3810	2000
21	Harwood Wealth Management Group	1,200	184	2001
22	Ring Associates Ltd	310	6	2002
23	Legacy Private Wealth Ltd	290	7	1982
24	Canaccord Genuity Group	990	247	1950
25	Paradigm Norton Financial Planning Ltd	480	16	2001
26	Grant Thornton Group	300	55	1924
27	HFMC Wealth Group	210	43	1999
28	HSBC Bank Group	6,000	129	1865
29	Chantler Kent Investments	210	8	2004
30	Succession	1,500	393	1998
31	Joseph R Lamb Independent Financial Advisers Ltd	260	7	1970
32	Perspective Group	640	47	1980
33	Fairstone Group	2,500	240	2005
34	Validpath Ltd	280	62	2001
35	Hoyl Group	250	29	2005
36	Chadney Bulgin LLP	67	20	1993
37	Close Brothers Group	410	279	1878
38	Smith & Williamson Group	3,000	259	1881
39	Best Practice IFA Group Ltd	1,300	230	2003
40	UBS Group	2,800	140	1862
41	LEBC Group Ltd	240	76	2000
42	Lumin Wealth Management Ltd	270	9	2010
43	Lloyds Banking Group	8,500	420	1765
44	InPartnership	1,800	279	2000
45	Chase de Vere Group	2,000	240	1969
46	Lonsdale Services Ltd	430	12	2003
47	Pharon Independent Financial Advisers Ltd	91	7	1973
48	Central Investment Services (Scotland) Ltd	200	9	1973
49	Argyle Consulting Ltd	300	12	1997
50	Saunderson House	3,500	58	1968

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51	Tilney Group	6,200	595	1836
52	N W Brown & Co Ltd	230	22	2000
53	Clayton Holmes Naisbitt Group	140	21	2008
54	Ludlow Wealth Management Group	29	14	1996
55	Punter Southall Group	910	115	1988
56	Portafina LLP	330	6	2009
57	Cullen Wealth Ltd	140	22	1998
58	The Private Office	540	29	2008
59	Balmoral Asset Management Ltd	76	10	1998
60	Chartwell Financial Services Ltd	200	4	1991
61	Wren Sterling Financial Planning Ltd	270	73	2014
62	Pannells Financial Planning Ltd	360	24	1989
63	Sense Network Ltd	1,300	182	2006
64	Barclays Group	2,900	57	1736
65	Advanta Wealth Ltd	250	15	2012
66	Attivo Group	170	16	2005
67	Sanlam Financial Services Group	1,500	194	1918
68	Skipton Group	860	0	1845
69	HFS Group	360	10	1986
70	Openwork	7,900	1190	1999
71	Magus Private Wealth Limited	310	15	1998
72	Grosvenor Consultancy Ltd	330	19	1998
73	Smith & Pinching	130	24	1998
74	Hargreaves Lansdown Group	29,000	167	1984
75	Loveday & Partners Ltd	360	11	2013
76	KW Group	420	27	2011
77	Argent Wealth Ltd	120	5	2009
78	Principal & Prosper Holdings Ltd	11	14	2007
79	Calculus Financial Planners	210	9	2011
80	Network Direct Ltd	380	78	2009
81	LGT Vestra	470	105	2007
82	Clairville York Ltd	200	6	1987
83	MacKenzie Investment Strategies Ltd	170	4	2010
84	Lomond Financial Management	130	5	2016
85	Investec Group	7,600	500	1974
86	Beaufort Financial Planning Ltd	430	28	2012
87	Gee & Watson Wealth Management Ltd	320	12	1974
88	Asset Management Financial Advisers Ltd	59	9	1987
89	Lighthouse Group	1,800	449	2000
90	Skerritt Consultants Ltd	310	18	2000
91	Russell Ulyatt Financial Services Ltd	74	3	2003
92	Wade Financial Services Ltd	150	4	1994
93	Charles James Financial Planning Ltd	120	6	1984
94	Cumberland Place Financial Management	360	8	2002
95	Estate Capital Financial Management Ltd	95	3	2003
96	Wills & Trusts IFP Ltd	66	4	1992
97	Lowes Financial Management	210	24	1971
98	The Royal Bank of Scotland Group	3,200	2	1727
99	Creative Advice Ltd	87	2	2006
100	Moore Stephens Group	350	36	1984

Research partner Strategic Insight receives data directly from fund managers covering 88 per cent of the retail market. Fund manager data is further supplemented and enhanced with platform funds. The top 25 fund managers account for 87 per cent of retail assets under management and Strategic Insight received sales data from 22 of these investment houses. Seventeen platforms submit data to Strategic Insight, including 16 at fund and intermediary level. The 17 platforms supplying data are: Aegon Wrap, Alliance Trust Savings, Ascentric, Elevate, FundsNetwork, James Hay, Novia, Nucleus, Parmenion, Quitter Wealth Solutions, Raymond James, Seven IM, Standard Life Wrap, Transact plus Zurich & Starling.

- o Assets Under Management invested in retail investment funds accounted for an average of 54 per cent of each adviser's score.
- o Net-flow accounted for an average of 23 per cent of each adviser's score
- o Years of service accounted for an average of 9 per cent of each adviser's score
- o CF30 accounted for an average of 8 per cent of each adviser's score
- o Retention accounted for an average of 3 per cent of each adviser's score
- o Estimated performance accounted for an average of 2 per cent of each adviser's score.