

| Company Name | Ranking | Ranking 2013 | Ranking 2012 | Ranking 2011 | Ranking 2010 | Ranking 2009 | Ranking 2008 | Gross sales (£m) 2013-14 | Number of CF30 Individuals | Notes | Website |
|--|---------|--------------|--------------|--------------|--------------|--------------|--------------|--------------------------|----------------------------|-------|--------------------------------------|
| St James's Place Wealth Management | 1 | 4 | 6 | 2 | 4 | - | - | 7,500 | 2,827 | - | www.sjp.co.uk |
| Hargreaves Lansdown | 2 | 1 | 3 | 5 | 38 | 39 | 6 | 6,600 | 142 | - | www.hl.co.uk |
| Brewin Dolphin | 3 | 2 | 2 | 3 | 3 | 11 | - | 2,500 | 512 | - | www.brewindolphin.co.uk |
| Openwork | 4 | 3 | 4 | 4 | 2 | 2 | 2 | 2,100 | 1,369 | - | www.openwork.uk.com |
| Intrinsic/Positive Solutions | 5 | 8 | 8 | 9 | 11 | 9 | 12 | 2,000 | 1,618 | - | www.intrinsicfs.com |
| Tenet | 6 | 5 | 9 | 12 | 7 | 6 | 7 | 1,900 | 705 | - | www.tenetgroup.co.uk |
| Quilter Cheviot | 7 | - | - | - | - | - | - | 1,800 | 186 | - | - |
| Succession | 8 | 11 | 13 | - | - | - | - | 1,600 | 320 | - | www.successionadvisoryservices.com |
| Barclays Group | 9 | 6 | 22 | 24 | 15 | 15 | 4 | 1,400 | 2,952 | - | www.barclayswealth.com / gerrard.htm |
| Investec Wealth & Investment | 10 | 10 | 5 | - | - | - | - | 1,300 | 375 | - | www.investecwin.co.uk |
| Sesame | 11 | 7 | 1 | 1 | 1 | 1 | 1 | 1,200 | 827 | - | www.sesame.co.uk |
| Brooks Macdonald | 12 | 12 | - | - | - | - | - | 1,100 | 66 | - | - |
| HSBC Bank Group | 13 | - | - | - | - | - | - | 1,100 | 2,393 | - | - |
| Ascot Lloyd | 14 | 51 | - | - | - | - | - | 1,000 | 40 | - | - |
| Charles Stanley | 15 | 13 | 7 | 13 | 18 | - | - | 900 | 361 | - | www.charles-stanley.co.uk |
| Raymond James Group | 16 | - | - | - | - | - | - | 800 | 84 | - | - |
| InPartnership | 17 | 15 | 19 | 23 | 26 | 23 | 21 | 800 | 305 | - | www.inpartnership.net |
| UBS Group | 18 | - | - | - | - | - | - | 750 | 2,464 | - | - |
| Rathbone Investment Management | 19 | 16 | - | - | - | - | - | 730 | 227 | - | - |
| Caerus Capital Group | 20 | - | - | - | - | - | - | 648 | 272 | - | - |
| Punter Southall | 21 | - | - | - | - | - | - | 640 | 60 | - | - |
| Lighthouse Group | 22 | 22 | 16 | 18 | 12 | 14 | 13 | 630 | 581 | - | www.lighthouseexpress.co.uk |
| IFG Group | 23 | 19 | 68 | - | - | - | - | 620 | 54 | - | www.ifg.co.uk |
| Chase de Vere | 24 | 20 | - | - | - | - | - | 600 | 203 | - | - |
| Standard Life Wealth | 25 | 18 | 24 | 26 | 28 | - | - | 550 | 49 | - | www.financial.ltd.uk |
| Financial Ltd Group | 26 | 14 | - | - | - | - | - | 540 | 286 | - | - |
| Sanlam | 27 | 23 | - | - | - | - | - | 520 | 131 | - | - |
| Ashcourt Rowan | 28 | 25 | 40 | - | 33 | - | - | 520 | 111 | - | www.ashcourtrowanfp.com |
| Smith & Williamson Group | 29 | 24 | 45 | 7 | 6 | 4 | 8 | 520 | 237 | - | www.smith.williamson.co.uk |
| JLT Group | 30 | 21 | 82 | 6 | 10 | 8 | - | 500 | 52 | - | www.jltdm.com |
| Tilney Smith & Williamson | 31 | 26 | 18 | 31 | 22 | 27 | 29 | 480 | 144 | - | www.bestinvest.co.uk |
| The Royal Bank of Scotland Group | 32 | - | - | - | - | - | - | 470 | 881 | - | - |
| Best Practice IFA Group | 33 | 29 | 26 | 39 | 58 | 87 | - | 450 | 174 | - | www.bestpractice.co.uk |
| Close Brothers Asset Management | 34 | 27 | 12 | 58 | 64 | - | - | 430 | 170 | - | www.closebrothersam.com |
| Towry Group | 35 | 30 | 10 | 11 | 16 | 16 | 14 | 390 | 229 | - | www.towry.com |
| Sense Network Ltd | 36 | 34 | 44 | 60 | 73 | - | - | 370 | 170 | - | www.sense-ifa.co.uk |
| LGT Vestra | 37 | 35 | - | - | - | - | - | 370 | 67 | - | - |
| C Hoare & Co | 38 | - | - | - | - | - | - | 350 | 28 | - | - |
| Skipton Group | 39 | 9 | 15 | 17 | 17 | 18 | 24 | 346 | 143 | - | www.skiptonfs.co.uk |
| Newell Palmer Group | 40 | 40 | 55 | 69 | - | 70 | 76 | 320 | 36 | - | www.newellpalmer.co.uk |
| Moneygate Group | 41 | - | - | - | - | - | - | 310 | 123 | - | - |
| Fidelius | 42 | 55 | - | - | - | - | - | 280 | 19 | - | - |
| HFS Milbourne Financial | 43 | 62 | - | - | - | - | - | 270 | 8 | - | - |
| Medical Money Management | 44 | 42 | 52 | 61 | 69 | 64 | 73 | 260 | 33 | - | www.medicalmoneymangement.co.uk |
| Equilibrium Asset Management | 45 | 33 | - | - | - | - | - | 260 | 9 | - | - |
| Grant Thornton Group | 46 | 32 | 23 | 26 | 28 | - | - | 260 | 49 | - | www.grant-thornton.co.uk |
| Perspective Group | 47 | - | - | - | - | - | - | 240 | 62 | - | - |
| Network Direct Ltd | 48 | 65 | - | - | - | - | - | 230 | 79 | - | - |
| Affinity Fin Awareness | 49 | 70 | 58 | 73 | 100 | - | - | 230 | 39 | - | www.affinityadvise.com |
| Marsh Commercial | 50 | 38 | 34 | 37 | 46 | - | - | 220 | 35 | - | www.jelfgroup.com |
| Tavistock Group | 51 | - | - | - | - | - | - | 220 | 26 | - | - |
| Kleinwort Benson Bank Ltd | 52 | - | - | - | - | - | - | 210 | 65 | - | - |
| James Hambro & Partners | 53 | - | - | - | - | - | - | 210 | 17 | - | - |
| Alan Steel (Asset Management) Ltd | 54 | 41 | 72 | 91 | 92 | 86 | 97 | 210 | 9 | - | www.alansteel.com |
| Compass Wealth Management Consultants Ltd | 55 | 67 | 70 | 82 | - | - | - | 210 | 36 | - | www.compasswmc.com |
| J M Finn | 56 | - | - | - | - | - | - | 190 | 100 | - | - |
| Foster Denovo | 57 | 31 | 29 | 34 | 39 | 28 | 28 | 190 | 82 | - | www.fosterdenovo.com |
| Smith & Pinching | 58 | 61 | - | - | - | - | - | 180 | 23 | - | - |
| Kellands Group | 59 | 43 | - | - | - | - | - | 170 | 34 | - | - |
| Ascot Lloyd Financial Services Ltd | 60 | 100 | - | - | - | - | - | 170 | 32 | - | - |
| HFMC Wealth | 61 | 75 | 57 | 76 | 76 | 76 | 70 | 170 | 18 | - | www.hfmcolumbus.com |
| Truestone Asset Management Ltd | 62 | 94 | - | - | - | - | - | 160 | 15 | - | - |
| Ellis Bates | 63 | 46 | - | - | - | - | - | 160 | 19 | - | - |
| James Brearley & Sons | 64 | - | - | - | - | - | - | 160 | 14 | - | - |
| KMG Independent | 65 | 88 | - | - | - | - | - | 160 | 4 | - | - |
| Pi Financial Ltd | 66 | 90 | 64 | 68 | 78 | 75 | 77 | 160 | 75 | - | www.dixonsutcliffe.com |
| Fraser Wealth Management Ltd | 67 | 78 | - | - | - | - | - | 160 | 4 | - | - |
| Argent Personal Finance Managers Ltd | 68 | - | - | - | - | - | - | 150 | 10 | - | - |
| Clarity Ltd | 69 | 71 | - | - | - | - | - | 150 | 6 | - | - |
| Epoch Wealth Management LLP | 70 | - | - | - | - | - | - | 150 | 9 | - | - |
| Joseph R Lamb Independent Financial Advisers | 71 | 36 | - | - | - | - | - | 150 | 6 | - | - |
| Helm Godfrey Partners Ltd | 72 | 60 | 60 | 77 | 88 | 74 | 71 | 150 | 25 | - | www.helmgodfrey.com |
| Beaufort Financial Planning | 73 | 39 | - | - | - | - | - | 140 | 24 | - | - |
| SG Hambros Bank Ltd | 74 | - | - | - | - | - | - | 140 | 87 | - | - |
| Wills & Trusts IFP | 75 | 85 | - | - | - | - | - | 140 | 3 | - | - |
| Chapel Independent Financial Advisers LLP | 76 | - | - | - | - | - | - | 140 | 7 | - | - |
| Cumberland Place Financial Management | 77 | 82 | - | - | - | - | - | 140 | 6 | - | - |
| Greyfriars Asset Management | 78 | - | - | - | - | - | - | 140 | 24 | - | - |
| Towergate Financial Group | 79 | 54 | 27 | 88 | - | - | - | 140 | 112 | - | www.towergatefinancial.co.uk / east |
| David Williams IFA Ltd | 80 | - | - | - | - | - | - | 130 | 10 | - | - |
| Mattioli Woods | 81 | 72 | 28 | 44 | 54 | 43 | 54 | 130 | 56 | - | www.mattioli-woods.com |
| Killik & Co LLP | 82 | 79 | - | - | - | - | - | 130 | 95 | - | - |
| Heartwood Wealth Management Ltd | 83 | - | - | - | - | - | - | 130 | 42 | - | - |
| Chartwell Financial Services Ltd | 84 | 59 | - | - | - | - | - | 130 | 5 | - | - |
| Argentis Financial Management Ltd | 85 | 80 | - | - | - | - | - | 130 | 24 | - | - |
| Pier Financial | 86 | - | - | - | - | - | - | 130 | 3 | - | - |
| Canaccord Genuity | 87 | - | - | - | - | - | - | 120 | 194 | - | - |
| Timothy James & Partners | 88 | 56 | 78 | - | - | - | - | 120 | 12 | - | www.tjpltd.co.uk |
| AIS Pensions | 89 | - | - | - | - | - | - | 120 | 2 | - | - |
| Origen Financial Services | 90 | 93 | - | - | - | - | - | 120 | 53 | - | - |
| Lift-Financial Ltd | 91 | 50 | 93 | - | - | - | - | 120 | 21 | - | www.lift-financial.com |
| HBFS Financial Services Ltd | 92 | 64 | - | - | - | - | - | 120 | 4 | - | - |
| Prescient Financial Intelligence Ltd | 93 | 76 | - | - | - | - | - | 120 | 8 | - | - |
| Advicelite Ltd | 94 | - | - | - | - | - | - | 120 | 5 | - | - |
| HJP Independent Financial Advisers Ltd | 95 | - | - | - | - | - | - | 120 | 10 | - | - |
| Skerritt Consultants | 96 | 92 | 77 | - | - | - | - | 110 | 13 | - | www.skerritts.co.uk |
| Speirs & Jeffrey Ltd | 97 | - | - | - | - | - | - | 110 | 34 | - | - |
| Balmoral Asset Management Ltd | 98 | 53 | - | - | - | - | - | 110 | 10 | - | - |
| The Fry Group | 99 | 58 | 61 | - | 60 | 54 | 59 | 110 | 20 | - | - |
| KBL | 100 | - | - | - | - | - | - | 110 | 0 | - | - |

Table notes

The gross sales are an estimate of the investment and pensions products sold from 1 July 2013 to 30 June 2014, obtained through Matrix Solutions' Financial Clarity product, which received information from providers, platforms and life and pensions companies. Where applicable, we have included data from business' execution-only platforms. The figures have been rounded up, and in some cases two different ranks produce the same sales. Where two figures are similar they have been ranked by Matrix Solutions according to their data. The table is a guide only. The different nature of the reports received does lead to bias towards firms that mostly trade directly with fund managers or through platforms rather than with life & pensions companies. Specifically, the sales figures include switches between funds as well as new businesses as fund managers are usually unable to differentiate the two for sales that they report. Life and pension companies do not tend to report fund switches. Share class conversions are not included. Only investments and pension sales have been included. Except for Hargreaves Lansdown, only firms whose primary business (i.e. majority of sales) is classified by Matrix Solutions as either financial advisers, wealth managers, and banks are included. All appointed representatives are included within the figures for their principal(s) regardless of whether they would be big enough to have their own entry within the Top 100. Appointed representatives with two recognised investment network principals are included within the figures for both principals are within the same group (e.g. Intrinsic). Directly authorised firms using service providers related to networks (e.g. Sesame Bankhall, TenetSelect) are not included within their sister network's figures. For the same reason service providers such as SimplyBiz, ThreeSixty do not appear in the list. Figures for some advisers may be understated where business is placed on white-labelled platforms. These include BestInvest, Best Practice, Towry, Towergate and True Potential. IFDL have provided data regarding sales on Succession and Openwork's platforms at their respective requests, and the figures for Bellpenney have been increased as a result of confirmation from Bellpenney. Others may also be understated if they use nominee services or non-contributing platforms and life and pensions companies. Investment figures for St. James Place have been taken from the relevant annual and interim reports. CF30 numbers may include qualified staff that are actively advising customers.