

Company name	Rank 2015	Rank 2014	Rank 2013	Rank 2012	Rank 2011	Gross Sales (£m)2014-15	Gross Sales (£m)2013-14	Number of CF30 individuals	Top 100 2016
St James's Place Wealth Management	1	1	4	6	2	8,300	7,500	1,380	-
Hargreaves Lansdown Group	2	2	1	3	5	7,400	6,600	152	-
Quilter plc	3	-	-	-	-	5,000	-	2,036	-
Openwork	4	4	3	4	4	2,700	2,100	976	-
Brewin Dolphin Ltd	5	3	2	2	3	2,400	2,500	471	-
Tenet	6	6	5	9	12	2,000	1,900	711	-
Barclays Group	7	9	6	22	24	1,800	1,400	2,716	-
Succession	8	8	11	13	-	1,600	1,600	330	-
Investec Wealth & Investment	9	10	10	5	-	1,500	1,300	409	-
Brooks Macdonald	10	12	12	-	-	1,400	1,100	86	-
HSBC Bank Group	11	13	-	-	-	1,100	1,100	2,522	-
Charles Stanley	12	15	13	7	13	1,100	900	338	-
Rathbone Investment Management	13	19	16	-	-	1,000	730	257	-
Tilney Group	14	31	26	18	31	1,000	480	162	-
The On-Line Partnership	15	17	15	19	23	1,000	800	317	-
Caerus Capital Group	16	20	-	-	-	950	648	303	-
Towry Group	17	35	30	10	11	850	390	298	-
Standard Life Aberdeen	18	25	18	24	26	847	550	42	-
Skipton Group	19	39	9	15	17	753	346	133	-
Sesame Bankhall Group	20	11	7	1	1	750	1,200	318	-
Punter Southall Group	21	21	-	-	-	700	640	79	-
UBS Group	22	18	-	-	-	700	750	2,412	-
Lighthouse Group	23	22	22	16	18	700	630	368	-
Chase de Vere	24	24	20	-	-	700	600	-	-
IFG Group	25	23	19	68	-	700	620	47	-
Raymond James Group	26	16	-	-	-	700	800	104	-
Smith & Williamson Group	27	29	24	45	7	650	520	252	-
Sanlam Financial Services Group	28	27	23	-	-	650	520	125	-
Close Brothers Asset Management	29	34	27	12	58	600	430	271	-
Tavistock Investments	30	51	-	-	-	600	220	226	-
Ascot Lloyd	31	14	51	-	-	550	1,000	83	-
Sense Network Ltd	32	36	34	44	60	550	370	166	-
Best Practice IFA Group Ltd	33	33	29	26	39	500	450	181	-
Perspective Group	34	47	-	-	-	450	240	60	-
LGT Vestra	35	37	35	-	-	400	370	71	-
JLT Group	36	30	21	82	6	400	500	55	-
Troy French & Partners	37	-	-	-	-	350	-	3	-
Newell Palmer Group	38	40	40	55	69	350	320	34	-
Fairstone Group	39	-	-	-	-	350	-	-	-
Network Direct Ltd	40	48	65	-	-	300	230	79	-
Ascot Lloyd Financial Services Ltd	41	60	100	-	-	300	170	47	-
C Hoare & Co	42	38	-	-	-	300	350	35	-
Medical Money Management	43	44	42	52	61	280	260	33	-
Grant Thornton Group	44	46	32	23	26	280	260	53	-
Kleinwort Benson Bank Ltd	45	52	-	-	-	280	210	52	-
Canaccord Genuity Group	46	87	-	-	-	280	120	240	-
Equilibrium Asset Management	47	45	33	-	-	260	260	9	-
The Royal Bank of Scotland Group	48	32	-	-	-	240	470	242	-
PI Financial Ltd	49	66	90	64	68	240	160	76	-
Wren Sterling Financial Planning Ltd	50	-	-	-	-	240	-	69	-
Compass Wealth Management Consultants Ltd	51	55	67	70	82	240	210	51	-
Helm Godfrey Partners Ltd	52	72	60	60	77	240	150	25	-
Affinity Fin Awareness	53	49	70	58	73	240	230	41	-
HJP Independent Financial Advisers Ltd	54	95	-	-	-	240	120	11	-
Gemini Wealth Management Ltd	55	-	-	-	-	220	-	14	-
Foster Denovo	56	57	31	29	34	220	190	66	-
Kellands Group	57	59	43	-	-	220	170	31	-
Alan Steel (Asset Management) Ltd	58	54	41	72	91	220	210	9	-
Argentis Financial Management Ltd	59	85	80	-	-	220	130	26	-
Mattioli Woods Plc	60	81	72	28	44	212	130	84	-
AIS Pensions	61	89	-	-	-	200	120	2	-
AFH Financial Group	62	-	-	-	-	200	-	150	-
Fidelius	63	42	55	-	-	200	280	14	-
Joseph R Lamb Independent Financial Advisers Ltd	64	71	36	-	-	200	150	7	-
Wills & Trusts IFP Ltd	65	75	85	-	-	200	140	4	-
EQ Investors	66	-	-	-	-	190	-	20	-
James Hambro & Partners	67	53	-	-	-	180	210	18	-
Marsh Commercial	68	50	38	34	37	180	220	34	-
Cullen Wealth Ltd	69	-	-	-	-	180	-	20	-
Ellis Bates	70	63	46	-	-	180	160	21	-
Clarity Ltd	71	69	71	-	-	170	150	6	-
True Potential Group	72	-	-	-	-	170	-	416	-
David Williams IFA Ltd	73	80	-	-	-	170	130	12	-
HFS Milbourne Financial	74	43	62	-	-	160	270	8	-
Central Investment Services (Scotland)	75	-	-	-	-	160	-	9	-
Kerr Henderson Group	76	-	-	-	-	150	-	31	-
HBFS Financial Services Ltd	77	92	64	-	-	150	120	5	-
A & J Wealth Management Ltd	78	-	-	-	-	150	-	5	-
Moore Stephens Group	79	-	-	-	-	140	-	24	-
Killik & Co LLP	80	82	79	-	-	140	130	98	-
Chetwood Wealth Management Ltd	81	-	-	-	-	140	-	19	-
Towergate Financial Group	82	79	54	27	88	140	140	24	-
Citibank International Ltd	83	-	-	-	-	140	-	923	-
James Brearley & Sons	84	64	-	-	-	140	160	14	-
Speirs & Jeffrey Ltd	85	97	-	-	-	140	110	36	-
Prescient Financial Intelligence Ltd	86	93	76	-	-	130	120	7	-
Chartwell Financial Services Ltd	87	84	59	-	-	130	130	5	-
Premier Financial Management Ltd	88	-	-	-	-	130	-	4	-
Merlin Financial Consultants Ltd	89	-	-	-	-	130	-	6	-
Wilfred T Fry (Personal Fin Plan)	90	-	-	-	-	130	-	19	-
Fraser Wealth Management Ltd	91	67	78	-	-	130	160	4	-
Validpath Ltd	92	-	-	-	-	130	-	50	-
Almary Green Investments	93	-	-	-	-	130	-	15	-
Skerritt Consultants Ltd	94	96	92	77	-	130	110	12	-
Pannells Financial Planning Ltd	95	-	-	-	-	130	-	21	-
Lift-Financial Ltd	96	91	50	93	-	120	120	16	-
Pharon Independent Financial Advisers Ltd	97	-	-	-	-	120	-	7	-
Investment Partnership LLP	98	-	-	-	-	120	-	2	-
Lord Financial Ltd	99	-	-	-	-	120	-	17	-
Greystone Financial Services Ltd	100	-	-	-	-	120	-	19	-

Table notes

Disclaimer: The gross sales are an estimate of the investment and pensions products sold from 1 July 2014 to 30 June 2015, 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 businesses' 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 business 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 have been included in both except where both principals are within the same group. 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 and ThreeSixty do not appear in the list. Figures for some advisers may be understated where business is placed on white-labelled platforms. These include Best Practice, Towry, Towergate and True Potential. IFDL have provided data regarding sales on Succession and Openwork's platforms at their respective requests. 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 who are actively advising customers.