

Rank 2015/16	Firm	Gross Sales 2015/16 £m	CF30's
1	St James's Place	10,100	3,328
2	Hargreaves Lansdown Group	5,500	147
3	Old Mutual Wealth	5,400	1,803
4	Brewin Dolphin Securities	2,500	423
5	The Tenet Group	2,100	642
6	Openwork	2,200	829
7	Succession	1,700	316
8	Barclays Group	1,600	213
9	Investec Group	1,500	403
10	HSBC Group	1,500	0
11	Brooks Macdonald	1,400	88
12	Timothy James & Partners Ltd	1,100	439
13	IFG Group	1,100	56
14	Charles Stanley	1,000	318
15	Rathbone Investment Management	1,000	0
16	Perspective Group	950	54
17	Caerus Capital Group	950	292
18	Standard Life	900	93
19	The On-Line Partnership	900	243
20	Lloyds Banking Group	750	210
21	Punter Southall Group	750	68
22	Sense Network	700	136
23	UBS Group	700	0
24	Skipton Group	700	94
25	Lighthouse Group	700	337
26	Raymond James Investment Services	650	105
27	Chase De Vere	650	214
28	Harwood Wealth Management Group	650	162
29	Tavistock Financial	650	230
30	Smith & Williamson	600	246
31	Close Brothers Asset Management	500	261
32	LGT Vestra	460	89
33	Fairstone Group	460	165
34	Best Practice Group	460	164
35	Sanlam Financial Services Group	440	137
36	Ascot Lloyd Bellpenny	440	60
37	C Hoare & Co	420	0
38	Joseph R Lamb Independent Financial Advisers Ltd	360	6
39	Prudential Group	340	266
40	Medical Money Management	340	30
41	Equilibrium Asset Management	340	10
42	Kleinwort Benson Bank Ltd	320	0
43	Bluefin Group	300	62
44	Grant Thornton UK	300	60
45	AFH Financial Group	280	143
46	PI Financial	280	74
47	Mattioli Woods Plc	260	86
48	Fideliis	260	13
49	Newell Palmer Group	240	34
50	EQ Investors	240	22
51	KMG Independent Ltd	240	5
52	Mazars Financial Planning Group	240	20
53	JLT Group	240	56
54	Cullen Wealth Ltd	220	20
55	Wealth at Work Group	220	31
56	The Royal Bank of Scotland Group	220	2
57	Canaccord Genuity Ltd	200	198
58	Chetwood Wealth Management Ltd	200	18
59	Wills & Trusts Ifp Ltd	200	4
60	Emery (Ifa) Ltd	200	5
61	Ludlow Wealth Management Group	200	12
62	True Potential	190	406
63	Central Investment Services (Scotland) Ltd	190	10
64	Walker Crips Group	180	119
65	Anderson Strathern Group	180	5
66	Chartwell Financial Services Ltd	180	5
67	Argent Personal Finance Managers Ltd	180	0
68	David Williams IFA Ltd	180	11
69	Gemini Wealth Management Ltd	180	13
70	HBFS Financial Services Ltd	180	6
71	Moore Stephens Group	180	34
72	Origen Financial Services Ltd	170	41
73	Helm Godfrey Partners Ltd	170	29
74	Alan Steel (Asset Management) Ltd	170	10
75	Skerritt Consultants Ltd	160	15
76	Argentis Financial Management Ltd	160	32
77	Edison Wealth Management Ltd	160	5
78	HJP Independent Financial Advisers Ltd	160	11
79	Ellis Bates Financial Solutions Ltd	160	38
80	AIS Pensions	160	2
81	Killik & Co	150	91
82	Principal & Prosper Holdings Ltd	150	12
83	Foster Denovo	150	67
84	Cumberland Place Financial Management	150	6
85	Timothy James & Partners Ltd	150	15
86	The Partners of The Private Office Ltd Liability Partnership	140	17
87	Pannells Financial Planning Ltd	140	23
88	James Brearley & Sons	140	13
89	Seven Investment Management Group	140	49
90	Profile Financial Solutions Ltd	140	19
91	Pharon Independent Financial Advisers Ltd	140	7
92	The Fry Group	140	19
93	Smith & Pinching Financial Services Ltd	130	14
94	HFS Milbourne Financial Services Ltd	130	9
95	Wren Sterling	130	71
96	LJ Financial	130	42
97	Argyle Consulting Ltd	130	10
98	Cornelian Asset Managers Ltd	130	11
99	Almary Green Investments	130	11
100	PQR Financial Planning Ltd	120	10

Table notes

The gross sales are an estimate of the investment and pensions products sold from 1 July 2015 to 30 June 2016, obtained through Strategic Insight's Financial Clarity product, which received information from providers, platforms and life and pension 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 Strategic Insight according to their data. The table is a guide only. The different nature of the reports received does lead to bias towards firms that most trade directly with fund managers or through platforms rather than with life and 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 sales that they report. Life and pensions 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 (ie a majority of sales) is classified by Strategic Insight 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 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 and True Potential. IFDL has provided data regarding sales on Succession and Openwork's platform 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's Place have been taken from the annual and interim report. CF30 numbers may include qualified staff who are actively advising customers. Certain firms no longer have CF30's registered against them following a change in the regulatory senior manager's regime in 2016.