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Top 100 Financial Advisers 2018, produced with Strategic Insight data

FT.com FT Adviser

	Company	Gross sales of retail investments and pensions over H2 2017 and H1 2018	Gross sales of retail investments and pensions over H2 2016 and H1 2017	Net sales of retail investments and pensions over H2 2017 and H1 2018	Net sales of retail investments and pensions over H2 2016 and H1 2017	Assets under management invested in retail investment funds 2018	Assets under management invested in retail investment funds 2017	Number of CF30s	Complaints Q1 & Q2 2018	Complaints Q3 & Q4 2017	Year founded
1	Tenet	1,600,000,000	1,700,000,000	830,000,000	970,000,000	2,900,000,000	3,100,000,000	526	0	0	1967*
2	JLT Group	630,000,000	420,000,000	250,000,000	290,000,000	400,000,000	470,000,000	57	0	0	1960
3	Mazars Financial Planning Ltd	460,000,000	330,000,000	160,000,000	140,000,000	890,000,000	700,000,000	31	0	0	1940
4	Kerr Henderson Group	200,000,000	80,000,000	50,000,000	65,000,000	660,000,000	100,000,000	10	0	0	1962
5	Wilfred T Fry (Personal Fin Plan)	220,000,000	120,000,000	65,000,000	39,000,000	240,000,000	210,000,000	22	0	0	1898
6	Quilter plc	10,300,000,000	9,700,000,000	3,500,000,000	3,800,000,000	29,000,000,000	30,000,000,000	2,254	0	0	1845
7	Raymond James Group	930,000,000	800,000,000	390,000,000	280,000,000	2,500,000,000	1,800,000,000	142	0	0	1962
8	Brewin Dolphin Ltd	3,300,000,000	2,700,000,000	1,000,000,000	880,000,000	10,000,000,000	9,600,000,000	430	0	0	1762
9	Foster Denovo	630,000,000	280,000,000	250,000,000	200,000,000	1,600,000,000	280,000,000	82	0	0	2005
10	Tavistock Group	430,000,000	520,000,000	190,000,000	290,000,000	570,000,000	520,000,000	166*	0	0	1975*
11	Wingate Group	110,000,000	88,000,000	38,000,000	48,000,000	300,000,000	120,000,000	13	0	0	1970
12	Beckett Inv Management	150,000,000	110,000,000	90,000,000	66,000,000	500,000,000	78,000,000	11	0	0	1988
13	Gibbs Denley Group	100,000,000	86,000,000	52,000,000	66,000,000	500,000,000	44,000,000	10	0	0	1990
14	Helm Godfrey Partners Ltd	200,000,000	220,000,000	95,000,000	98,000,000	410,000,000	260,000,000	29	0	0	1990
15	Pi Financial Ltd	170,000,000	230,000,000	88,000,000	100,000,000	220,000,000	180,000,000	45	0	0	1991
16	Independent Financial Strategies Ltd	220,000,000	190,000,000	150,000,000	99,000,000	360,000,000	230,000,000	11	0	0	1983
17	Lovewell Blake Group	100,000,000	68,000,000	27,000,000	25,000,000	200,000,000	160,000,000	8	0	0	1858
18	Westminster Wealth Management LLP	210,000,000	210,000,000	120,000,000	96,000,000	250,000,000	190,000,000	33	0	0	2000
19	True Potential Group	230,000,000	150,000,000	130,000,000	32,000,000	690,000,000	500,000,000	433	0	0	2007
20	St James's Place Wealth Management	15,000,000,000.00	£13,000,000,000.00	£9,500,000,000.00	£6,600,000,000.00	£83,000,000,000.00	£97,000,000,000.00	3810	58	57	2000
21	Harwood Wealth Management Group	820,000,000	760,000,000	280,000,000	350,000,000	1,200,000,000	1,100,000,000	184	0	0	2001
22	Ring Associates Ltd	120,000,000	75,000,000	73,000,000	53,000,000	310,000,000	59,000,000	6	0	0	2002
23	Legacy Private Wealth Ltd	110,000,000	94,000,000	68,000,000	59,000,000	290,000,000	200,000,000	7	0	0	1982
24	Canaccord Genuity Group	420,000,000	300,000,000	71,000,000	15,000,000	990,000,000	800,000,000	247	0	0	1950
25	Paradigm Norton Financial Planning Ltd	120,000,000	140,000,000	44,000,000	73,000,000	480,000,000	170,000,000	16	0	0	2001
26	Grant Thornton Group	210,000,000	310,000,000	140,000,000	240,000,000	300,000,000	1,100,000,000	55	0	0	1924
27	HFMC Wealth Group	130,000,000	130,000,000	38,000,000	38,000,000	210,000,000	130,000,000	43*	0	0	1999*
28	HSBC Bank Group	1,100,000,000	1,300,000,000	-£8,000,000	-£290,000,000	6,000,000,000	4,900,000,000	129	7,981	7,202	1865
29	Chantler Kent Investments	100,000,000	68,000,000	62,000,000	37,000,000	210,000,000	55,000,000	8	0	0	2004
30	Succession	640,000,000	1,900,000,000	210,000,000	630,000,000	1,500,000,000	900,000,000	393	0	0	1998
31	Joseph R Lamb Independent Financial Advisers Ltd	250,000,000	520,000,000	58,000,000	180,000,000	260,000,000	200,000,000	7	0	0	1970
32	Perspective Group	330,000,000	990,000,000	77,000,000	390,000,000	640,000,000	480,000,000	47	0	0	1980
33	Fairstone Group	950,000,000	830,000,000	320,000,000	450,000,000	2,500,000,000	1,400,000,000	240	0	0	2005
34	Validpath Ltd	140,000,000	110,000,000	54,000,000	46,000,000	280,000,000	220,000,000	62	0	0	2001
35	Hoyl Group	110,000,000	72,000,000	48,000,000	45,000,000	250,000,000	180,000,000	29	0	0	2005
36	Chadney Bulgin LLP	120,000,000	67,000,000	74,000,000	54,000,000	67,000,000	110,000,000	20	0	0	1993
37	Close Brothers Asset Management	680,000,000	830,000,000	170,000,000	330,000,000	410,000,000	2,000,000,000	279	256	222	1878
38	Smith & Williamson Group	720,000,000	590,000,000	210,000,000	88,000,000	3,000,000,000	2,700,000,000	259	0	0	1881
39	Best Practice IFA Group Ltd	530,000,000	500,000,000	180,000,000	230,000,000	1,300,000,000	861,000,000	230	0	0	2003
40	UBS Group	520,000,000	380,000,000	-£110,000,000	100,000,000	2,800,000,000	1,100,000,000	140	0	0	1862
41	LEBC Group Ltd	250,000,000	380,000,000	190,000,000	340,000,000	240,000,000	600,000,000	76	0	0	2000
42	Lumin Wealth Management Ltd	150,000,000	94,000,000	78,000,000	58,000,000	270,000,000	170,000,000	9	0	0	2010
43	Lloyds Banking Group	1,900,000,000	2,200,000,000	-£670,000,000	-£330,000,000	8,500,000,000	11,000,000,000	420	43,578	20,577	1765
44	InPartnership	770,000,000	950,000,000	350,000,000	500,000,000	1,800,000,000	1,700,000,000	279	0	0	2000
45	Chase de Vere Group	1,000,000,000	1,300,000,000	560,000,000	750,000,000	2,000,000,000	4,100,000,000	240	0	0	1969
46	Lonsdale Services Ltd	140,000,000	100,000,000	32,000,000	82,000,000	430,000,000	81,000,000	12	0	0	2003
47	Pharon Independent Financial Advisers Ltd	140,000,000	150,000,000	78,000,000	100,000,000	91,000,000	220,000,000	7	0	0	1973
48	Central Investment Services (Scotland) Ltd	230,000,000	210,000,000	56,000,000	57,000,000	200,000,000	200,000,000	9	0	0	1973
49	Argyle Consulting Ltd	170,000,000	170,000,000	73,000,000	78,000,000	300,000,000	280,000,000	12	0	0	1997
50	Saunderson House	1,300,000,000	1,500,000,000	480,000,000	700,000,000	3,500,000,000	4,000,000,000	58	0	0	1968
51	Tilney Group	1,800,000,000	1,000,000,000	-£520,000,000	250,000,000	6,200,000,000	7,700,000,000	595	0	0	1836
52	N W Brown & Co Ltd	150,000,000	91,000,000	57,000,000	42,000,000	230,000,000	180,000,000	22	0	0	2000
53	Clayton Holmes Naisbitt Group	120,000,000	110,000,000	51,000,000	56,000,000	140,000,000	110,000,000	21	0	0	2008
54	Ludlow Wealth Management Group	170,000,000	290,000,000	130,000,000	260,000,000	29,000,000	82,000,000	14	0	0	1996
55	Punter Southall Group	1,200,000,000	800,000,000	300,000,000	650,000,000	910,000,000	1,800,000,000	115	0	0	1988
56	Portafina LLP	200,000,000	160,000,000	180,000,000	140,000,000	330,000,000	270,000,000	6	0	0	2009
57	Cullen Wealth Ltd	140,000,000	160,000,000	82,000,000	100,000,000	140,000,000	280,000,000	22	0	0	1998
58	The Private Office	170,000,000	120,000,000	65,000,000	20,000,000	540,000,000	300,000,000	29	0	0	2008
59	Balmoral Asset Management Ltd	170,000,000	100,000,000	130,000,000	94,000,000	76,000,000	92,000,000	10	0	0	1998
60	Chartwell Financial Services Ltd	310,000,000	370,000,000	10,000,000	-£42,000,000	200,000,000	25,000,000	4	0	0	1991
61	Wren Sterling Financial Planning Ltd	120,000,000	110,000,000	90,000,000	83,000,000	270,000,000	290,000,000	73	0	0	2014
62	Pannells Financial Planning Ltd	270,000,000	190,000,000	39,000,000	64,000,000	360,000,000	240,000,000	24	0	0	1989
63	Sense Network Ltd	860,000,000	970,000,000	230,000,000	310,000,000	1,300,000,000	1,200,000,000	182	0	0	2006
64	Barclays Group	950,000,000	1,700,000,000	-£160,000,000	-£98,000,000	2,900,000,000	4,300,000,000	57	14,085	13,261	1736
65	Advanta Wealth Ltd	170,000,000	76,000,000	75,000,000	40,000,000	250,000,000	180,000,000	15	0	0	2012
66	Attivo Group	110,000,000	110,000,000	48,000,000	33,000,000	170,000,000	140,000,000	16	0	0	2005
67	Sanlam Financial Services Group	660,000,000	820,000,000	120,000,000	430,000,000	1,500,000,000	2,400,000,000	194	0	0	1918
68	Skipton Group	620,000,000	1,300,000,000	420,000,000	1,100,000,000	860,000,000	3,300,000,000	0	152	99	1845
69	HFS Group	180,000,000	200,000,000	46,000,000	21,000,000	360,000,000	250,000,000	10	0	0	1986
70	Openwork	2,800,000,000	3,300,000,000	770,000,000	1,500,000,000	7,900,000,000	7,200,000,000	1,190	66	50	1999
71	Magus Private Wealth Limited	100,000,000	70,000,000	36,000,000	26,000,000	310,000,000	200,000,000	15	0	0	1998
72	Grosvenor Consultancy Ltd	130,000,000	130,000,000	51,000,000	29,000,000	330,000,000	270,000,000	19	0	0	1998
73	Smith & Pinching	170,000,000	200,000,000	43,000,000	41,000,000	130,000,000	160,000,000	24	0	0	1998
74	Hargreaves Lansdown Group	6,900,000,000	7,400,000,000	1,200,000,000	1,900,000,000	29,000,000,000	23,000,000,000	167	54	46	1984
75	Loveday & Partners Ltd	190,000,000	120,000,000	82,000,000	64,000,000	360,000,000	290,000,000	11	0	0	2013
76	KW Group	140,000,000	47,000,000	21,000,000	29,000,000	420,000,000	95,000,000	27	0	0	2011
77	Argent Wealth Ltd	120,000,000	80,000,000	56,000,000	32,000,000	120,000,000	59,000,000	5	0	0	2009
78	Principal & Prosper Holdings Ltd	300,000,000	320,000,000	260,000,000	310,000,000	11,000,000	63,000,000	14	0	0	2007
79	Calculis Financial Planners	120,000,000	120,000,000	47,000,000	38,000,000	210,000,000	160,000,000	9	0	0	2011
80	Network Direct Ltd	170,000,000	190,000,000	78,000,000	130,000,000	380,000,000	360,000,000	78	0	0	2009
81	LGT Vestra	650,000,000	690,000,000	300,000,000	610,000,000	470,000,000	1,800,000,000	105	0	0	2007
82	Clairville York Ltd	110,000,000	93,000,000	29,000,000	22,000,000	200,000,000	150,000,000	6	0	0	1987
83	MacKenzie Investment Strategies Ltd	160,000,000	78,000,000	74,000,000	32,000,000	170,000,000	100,000,000	4	0	0	2010
84	Lomond Financial Management	110,000,000	43,000,000	53,000,000	33,000,000	130,000,000	60,000,000	5	0	0	2016
85	Investec Group	2,100,000,000	1,800,000,000	500,000,000	570,000,000	7,600,000,000	6,900,000,000	500	0	0	1974
86	Beaufort Financial Planning Ltd	310,000,000	240,000,000	75,000,000	81,000,000	430,000,000	330,000,000	28	0	0	2012
87	Gee & Watson Wealth Management Ltd	100,000,000	110,000,000	24,000,000	23,000,000	320,000,000	230,000,000	12	0	0	1974
88	Asset Management Financial Advisers Ltd	160,000,000	140,000,000	23,000,000	28,000,000	59,000,000	62,000,000	9	0	0	1987
89	Lighthouse Group	550,000,000	840,000,000	250,000,000	480,000,000	1,800,000,000	2,200,000,000	449	0	0	2000
90	Skerritt Consultants Ltd	230,000,000	180,000,000	55,000,000	60,000,000	310,000,000	240,000,000	18	0	0	2000
91	Russell Ullyatt Financial Services ltd	130,000,000	56,000,000	71,000,000	54,000,000	74,000,000	49,000,000	3	0	0	2003
92	Wade Financial Services Ltd	110,000,000	91,000,000	32,000,000	22,000,000	150,000,000	120,000,000	4	0	0	1994
93	Charles James Financial Planning Ltd	130,000,000	98,000,000	21,000,000	19,000,000	120,000,000	97,000,000	6	0	0	1984
94	Cumberland Place Financial Management	110,000,000	160,000,000	50,000,000	52,000,000	360,000,000	300,000,000	8	0	0	2002
95	Estate Capital Financial Management Ltd	140,000,000	120,000,000	50,000,000	38,000,000	95,000,000	57,000,000	3	0	0	2003
96	Wills & Trusts IFP Ltd	200,000,000	150,000,000	25,000,000	24,000,000	66,000,000	53,000,000	4	0	0	1992
97	Lowes Financial Management	120,000,000	110,000,000	79,000,000	83,000,000	210,000,000	520,000,000	24	0	0*	1971
98	The Royal Bank of Scotland Group	380,000,000	1,400,000,000	-£160,000,000	1,200,000,000	3,200,000,000	1,900,000,000	2	11,344	8,246	1727
99	Creative Advice Ltd	100,000,000	94,000,000	33,000,000	31,000,000	87,000,000	71,000,000	2	0	0	2006
100	Moore Stephens Group	240,000,000	250,000,000	61,000,000	170,000,000	350,000,000	440,000,000	36	0	0	1984

Table notes

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 feeds. 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, Quilter Wealth Solutions, Raymond James, Seven IM, Standard life Wrap, Transact plus Zurich & Sterling. Figures with asterisks have been disputed by the firms in question. An incorrect complaints figure for Q3/Q4 2018 was cited in the original publication for Lowes Financial Management.

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