

Rank	Firm Name	Type	Chartered by CII or Accredited by CISI	# of CF30s, as at Dec 31 2019	Net sales, year to June 30 2020 (rounded)	AUM, year to June 30 (rounded)
1	Quilter	Group	No	1481	£3,200m	£25,000m
2	Bartlett Wealth Management	Firm	Yes	8	30m	240m
3	FB Wealth Management	Group	No	11	52m	310m
4	Pharon Independent Financial Advisers	Firm	Yes	7	70m	380m
5	Mazars Financial Planning	Firm	Yes	25	93m	1,200m
6	1825	Group	Yes	76	44m	2,300m
7	Skerritt Consultants	Firm	Yes	13	64m	380m
8	Attivo Group	Group	Yes	45	130m	550m
9	Punter Southall	Group	Yes	125	310m	2,500m
10	Beckett Financial Services	Firm	Yes	12	94m	610m
11	Premier Wealth Planning	Firm	Yes	18	95m	500m
12	Keyte	Firm	Yes	4	27m	99m
13	JLT Group	Group	Yes	66	350m	1,500m
14	Lycetts Financial Services	Firm	Yes	10	18m	220m
15	Marsh Commercial	Group	Yes	245	610m	4,400m
16	Smith & Pinching	Firm	Yes	20	43m	660m
17	Handelsbanken Wealth Management	Firm	No	49	63m	260m
18	Advanta Wealth	Firm	Yes	15	44m	370m
19	Paradigm Norton	Firm	Yes	23	73m	260m
20	Natwest Group	Group	No	0	540m	3,100m
21	Johnston Carmichael Wealth	Firm	Yes	17	29m	450m
22	Antrams	Firm	No	14	64m	410m
23	Wingate Group	Group	Yes	12	31m	350m
24	HFMC Wealth	Group	Yes	64	48m	290m
25	PI Financial	Network	No	52	100m	470m
26	Schofield Money	Firm	Yes	6	30m	210m
27	Greaves West & Ayre	Firm	No	7	21m	210m
28	Lovewell Blake Financial Planning	Firm	No	7	28m	270m
29	Fairstone	Group	Yes	267	330m	4,800m
30	HDA	Firm	Yes	5	10m	83m
31	Hoyle Group	Group	No	48	100m	630m
32	St James's Place Wealth Management	Network	No	2,131	9,000m	120,000m
33	Creative	Group	Yes	25	49m	120m
34	Chase de Vere	Group	No	208	450m	5,300m
35	IFT Wealth Management	Firm	Yes	3	9m	33m
36	Ellis Bates	Group	No	52	54m	170m
37	McHardy Financial	Firm	Yes	15	24m	340m
38	Argyle Consulting	Firm	Yes	12	54m	420m
39	Cullen Wealth	Firm	Yes	22	67m	670m
40	Hazlewoods Financial Planning	Firm	No	5	26m	300m
41	Westminster Wealth Management	Firm	Yes	0	84m	410m
42	Origen Financial Services	Firm	No	54	250m	1,300m
43	Openwork	Group of Networks	No	1,000	800m	10,000m
44	Wills & Trusts IFP	Firm	Yes	10	12m	93m
45	Lomond Financial Management	Network	Yes	6	22m	180m
46	Tavistock Group	Group	No	184	170m	1,500m
47	Kerr Henderson	Group	No	16	77m	580m
48	Pareto Financial Planning	Firm	No	17	65m	270m
49	Joseph R Lamb Independent Financial Advisers	Firm	No	8	45m	310m
50	Canter Holland	Firm	Yes	9	23m	150m
51	Martin Aitken Financial Services	Firm	Yes	5	6m	210m
52	WPS Advisory	Firm	No	33	220m	430m
53	Tenet	Group of Networks	No	260	450m	5,200m
54	Broadstone Group	Group	No	30	£61m	£370m
55	Validpath	Network	No	55	50m	370m
56	Wren Sterling Financial Planning	Firm	No	73	110m	910m
57	Charles Stanley	Firm	No	251	51m	930m
58	Chadney Bulgin	Firm	Yes	21	24m	620m
59	Mutual Financial Management	Firm	No	9	48m	51m
60	PK Financial Planning	Firm	No	11	27m	250m
61	InPartnership	Group of Networks	No	302	290m	2,900m
62	TSP Wealth	Firm	No	2	36m	130m
63	Atkins Ferrie Wealth Management	Firm	No	7	29m	130m
64	Clark Gillone	Firm	No	11	51m	490m
65	Francis Clark Financial Planning	Firm	Yes	0	34m	420m
66	True Potential	Group	No	601	79m	1,200m
67	CRS Consultants	Firm	No	4	19m	140m
68	A & J Wealth Management	Firm	No	8	43m	340m
69	Foster Denovo	Group	No	72	220m	1,700m
70	Gale & Phillipson	Group	No	36	68m	740m
71	Edison Wealth Management	Firm	No	5	47m	77m
72	Portfolio Financial Consultancy	Firm	No	6	16m	180m
73	Brooks Macdonald	Group	Yes	80	25m	450m
74	Smith & Williamson Group	Group	No	515	290m	7,800m
75	Sense Network	Network	No	177	200m	2,400m
76	Pannells Financial Planning	Firm	No	24	51m	540m
77	Progeny Wealth	Firm	No	29	70m	1,100m
78	Best Practice IFA Group	Group	Yes	72	110m	2,700m
79	Sanlam	Group of Networks	No	274	110m	2,300m
80	Skipton Group	Group	No	93	130m	5,500m
81	James Brearley & Sons	Firm	No	12	20m	560m
82	Douglas Steers & Co	Firm	No	2	16m	100m
83	KMG Independent	Firm	Yes	9	35m	360m
84	Lifetime Financial Management	Group	No	18	9m	33m
85	Ludlow Wealth Management	Firm	No	13	92m	1,200m
86	Perry Financial Management	Firm	No	1	5m	19m
87	Joslin Rhodes Lifestyle Financial Planning	Firm	No	9	12m	43m
88	Beaufort Financial Planning	Network	No	47	52m	800m
89	HFS Milbourne Financial	Group	No	10	31m	400m
90	Timothy James & Partners	Firm	No	17	54m	630m
91	ASC Financial Solutions	Firm	No	2	16m	93m
92	Reeves Independent	Firm	No	0	19m	38m
93	Loveday & Partners	Firm	No	15	39m	450m
94	Close Brothers Asset Management	Firm	No	164	150m	1,900m
95	Lumin Wealth Management	Firm	Yes	9	24m	390m
96	FM IFA	Firm	No	5	24m	190m
97	Unbiased Financial Group	Firm	No	7	8m	53m
98	LGT Vestra	Firm	No	128	40m	460m
99	Lathe & Co	Firm	No	6	150m	220m
100	Canaccord Genuity	Group	No	204	200m	880m

### Table notes

The list includes only firms whose primary business (i.e. majority of sales) is classified by Matrix Solutions as financial advisers, wealth management or banking. Individual firms that are affiliated with a wider group are included within the figures for the wider group and appointed representatives are included within the figures for their principal, regardless of whether they could appear individually. The figures for the list have been rounded up and include assets invested in retail investments and pensions, reported to Matrix Solutions by our Financial Clarity partners, other assets, such as those invested in discretionary funds or portfolios, hedge funds etc. are not included. Matrix Solutions receives data directly from fund managers covering 90 per cent of the UK retail investment market into their Financial Clarity product. Fund manager data is further supplemented and enhanced with platform feeds. The top 25 fund managers account for 80 per cent of retail assets under management and Matrix Solutions received sales data from 22 of these investment houses. Sixteen platforms submit data to Matrix Solutions, including 15 at fund and intermediary level. High platform coverage provides visibility of platform sales from fund managers not currently contributing directly to Financial Clarity. CF30 numbers may include qualified staff who are actively advising customers. Certain firms no longer have CF30s registered against them following a change in the regulatory regime in March 2016. Matrix is an ISS Market Intelligence company.