

Top 25 Financial Planning Companies 2015 - the results

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This year the Top 25 Financial Planning Companies changed both in its questioning of firms and in the kinds of firms it looked at - not to mention it moved between PAM Insight publications; from *eprivateclient* to *thewealthnet*.

We decided not to include firms which offered investment management, or are have an investment management sister firm, to tighten what defines an 'independent financial adviser'.

Looking at the 25 here it is plain to see many are thriving now without investment management arms, offering ungarished whole of market advice. It is also evident the diversity of shapes and sizes financial planners come in all the way from 'one man bands' to businesses employing 204 advisers.

It is a diversity which is encouraging, for it means as the sector develops and recruits, new advisers will find a choice of models to emulate if they set up their own practices or a broad choice of different kinds of employers.

Ultimately we wanted to identify not just the biggest advisory firms but also those who offered the best advice and were truly client focused. Everyone including those who did not make the final list can truly say they put the client first on the evidence we have seen.

Therefore this is also an opportunity to recognise that quality in all its shapes and sizes along the length and breadth of the country.

	Directors	Advisers	Clients	Adviser Client Ratio	2014 Fee Income (£)	Independent or Restricted
Alpha Financial Advice*	2	2	90	45	600,000	Independent
Astute Wealth	2	5	250	50	1,100,000*	Independent
Baigrie Davies	4	13	860	66	3,800,000	Independent
Buckingham Gate	2	2	57	50	100,000**	Independent
Capital Asset Management	4	2	180	45	1,650,000	Independent
Chase de Vere	6	204	17,379	85	3,800,000	Independent

	Directors	Advisers	Clients	Adviser Client Ratio	2014 Fee Income (£)	Independent or Restricted
Clarendon Financial Planning	1	6	450	75	1,100,000	Independent
Donald Wealth Management	2	1	85	85	601,000	Independent
Financial Planning Objectives*	2	2	80	40	800,000	Independent
Grant Thornton	5	13	3000	85	26,000,000	Independent
Helm Godfrey	6	25	3500	150	5,300,000	Independent
IFA Ltd	2	15	900	60	4,000,000	Independent
Jamieson Christie*	6	6	300	50	1,000,000	Independent
Mercer & Hole	3	3	177	59	794,000	Independent
Midas Fides	1	1	50	50	500,000*	Independent
North Laine*	4	4	240	60	700,000	Independent
Origen	6	60	350,000	225	17,000,000	Restricted
Partners Wealth Management	5	22	1000	50	6,100,000	Independent
Petrus	4	4	286	72	1,280,000	Independent
PQR	4	14	1800	128	2,750,000	Independent
Scottsdale*	5	5	200	40	700,000	Independent
Smart Financial	3	3	350	116	750,000	Independent
Strabens Hall	6	7	300	43	1,250,000	Independent
The Private Office	2	13	960	75	4,200,000	Independent
Treowe*	1	1	80	80	350,000	Independent

**publishers estimate*

***publishers estimate/first year trading*

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