

## OUR CREDENTIALS



Our core portfolios have been **five star** defaqto rated for **six consecutive years**.



We are the **number one** rated wealth management house on **Trust Pilot** and **VouchedFor**.



We incorporate one of the **UK's largest** Chartered financial planning firms.

## INVESTING IN GROWTH



We've seen

**96%**

**adviser retention** pre and post acquisition...



...and

**100%**

**principal retention** pre and post acquisition



...as well as

**98%**

**client retention** pre and post acquisition



Our organic **client growth** stands at

**8.8%**



Our organic **recurring income** is

**9%**

## MAXIMISING VALUE

**11%**

Our acquired firms achieved an average of **11%** outperformance against target sale value.

## SIZE AND SCALE



We have

**380**

regulated advisers



alongside

**295**

operational staff



We oversee

**£11bn**

of client investment funds



We arrange

**£1.6bn**

annually in property finance



We have recurring fee income of

**76%**



and total repeating income of

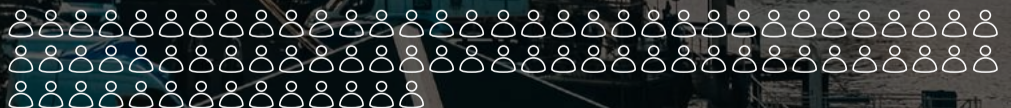
**92%**

Our clients are at the **heart** of everything we do.

We service over

**40,000**

wealth clients.



Plus

**30,000**

transactional clients.

