

OUR CREDENTIALS



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



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

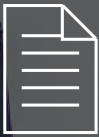


We incorporate one of the **UK's largest** Chartered financial planning firms.

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 growth** is **9%**

MAXIMISING VALUE

16%

Our acquired firms achieved an average of 16% outperformance against target sale value.

SIZE AND SCALE



400 regulated advisers and **380** operational staff



We oversee **£13bn** of client investment funds



We arrange **£2bn** annually in property finance



We have recurring fee income of **76%**



and total repeating income of **92%**



with **£100m** gross fee income

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



We service over

40,000 wealth clients.



Plus

30,000 transactional clients.

