

OUR FIGURES AT A GLANCE 2023

98%
client
retention



Incorporating one of the
UK's largest Chartered
financial planning firms

46,000
transactional clients

55,000
wealth clients



Our core portfolios have
been 5-star Defaqto rated
for seven consecutive years

94%
repeat
adviser
retention

Average of
13%
outperformance
against target
sale value

500 regulated
advisers



The number one rated
wealth management
house on trust pilot.

£15BN
in funds under
management

700 operational
staff

90%
repeating
revenue

100%
principal retention

94%
repeating
income