

UK wealth managers: services																									
Wealth manager	Services offered																								
	Access to Alternative Finance / Crowdfunding	Advisory Investment Management	Banking	Brokerage	Charity Services	Commodities	Concierge	Bespoke Discretionary Investment Management	Discretionary Model Portfolio/Fund	Family Office services	Hedge Funds (including funds of funds)	In-house Fund Management	Insurance	Mortgages	Offshore Services	Online Discretionary Investment Management (aka 'Robo-advice')	Online Services	Pension & Retirement Planning	Philanthropic Planning	Private Equity	Tax Planning	Trust & Estate Planning	Cryptocurrency trading	Succession planning	
LGT Wealth Management	X	X			X			X	X	X	X	X		X	X			X	X	X		X		X	
Evelyn Partners		X		X	X	X		X	X	X	X	X	X		X	X	X	X	X	X	X	X	X		X
Quilter Cheviot		X			X			X	X		X				X			X			X	X			
Arbion Limited		X						X	X	X	X	X								X					
Rothschild & Co, Wealth Management			X	X	X	X		X	X	X	X	X		X	X		X	X	X						X
RBC Brewin Dolphin		X			X			X	X		X				X	X		X	X		X	X			X
Highwood Financial Services		X											X		X		X	X			X	X			X
Vermeer Partners		X						X	X		X	X	X	X	X			X			X				X
Julius Baer International		X		X		X		X	X	X	X	X	X	X	X		X	X	X	X			X		X
Brown Shipley, a Quintet Private Bank		X	X					X	X		X			X			X	X		X	X	X			X
SG Kleinwort Hambros		X	X	X	X	X		X	X	X	X	X	X	X	X		X	X	X	X		X			X
James Hambro & Partners LLP					X			X	X		X				X			X				X			X
Rathbones Group Plc		X	X		X			X	X		X	X			X		X	X	X		X	X			
McInroy & Wood					X			X			X				X		X								
Brooks Macdonald					X			X	X		X	X	X		X		X	X	X		X	X			X
Nedbank Private Wealth			X					X	X		X			X	X		X	X	X			X			X
JM Finn		X			X			X	X		X						X	X			X	X			X
Charles Stanley		X		X	X			X	X		X						X	X	X		X	X			X
Meridien Investment Management					X			X	X		X				X		X								
Hawksmoor Investment Management								X	X		X														
Waverton					X			X	X		X		X	X	X		X	X	X		X	X			X
Stonehage Fleming		X		X	X			X	X	X	X	X	X		X			X	X	X	X	X			X
Cazenove Capital, Schroders			X		X			X	X	X	X	X			X		X	X	X	X		X			X
Ruffer LLP								X	X		X														
7IM		X			X			X	X	X	X	X	X	X	X			X		X	X	X			X
EFG Harris Allday		X			X			X																	

Balanced Portfolio (Typically 35 – 55% equity)						
Wealth manager	Balanced portfolio details			Data submitted to ARC for verification	% total returns net of fees	
	Name	Product type (Portfolio, Model, Fund, Composite of Portfolios, PCI)	1 year		3 years cumulative	5 years cumulative
7IM	7IM Blended Income Model Portfolio	Model	Yes	5.3	6.2	20.4
Arbion Limited	GBP Balanced Balanced Asset	PCI	Yes	8.4	11.01	33.76
Brooks Macdonald	Brooks Macdonald BPS Low to Medium Risk	Composite of Portfolios	Yes	6.83	3.24	20.98
Brown Shipley, a Quintet Private Bank	SVS Brown Shipley Income Fund	Fund	Yes	7.86	-1.84	19.51
Cazenove Capital, Schroders	SUTL Cazenove GBP Balanced Fund	Fund	Yes	5.7	4.6	28.8
Charles Stanley	Dynamic Passive 3	Model	Yes	11	8	29
Evelyn Partners	Evelyn Partners Balanced Asset GBP	PCI	Yes	6.35	8.01	24.75
Hawksmoor Investment Management	Moderate Balanced	Portfolio	Yes	5	5.2	19
Highwood Financial Services	HWM Profile 4	Model	No	7.29	2.19	14.57
James Hambro & Partners LLP	James Hambro & Partners Balanced Portfolios	Composite of Portfolios	Yes	7.2	5.3	26.9
JM Finn	CSI Income & Growth Fund	Fund		5	3	25
Julius Baer International	GBP Global Premium Balanced	Composite of Portfolios	Yes	10.12	6.53	33.57
LGT Wealth Management	GBP Global Medium	Model	Yes	6	0	23
Nedbank Private Wealth	Nedbank GBP Balanced Asset PCI	PCI	Yes	5.68	4.29	16.18
Quilter Cheviot	Quilter Cheviot GBP Balanced PCI	PCI	Yes	6.56	2.35	18.5
RBC Brewin Dolphin	BD CC balanced asset	Composite of Portfolios	Yes	7.18	6.2	30.42
Rothschild & Co, Wealth Management	Rothschild & Co Sterling Cautious Composite	Composite of Portfolios	Yes	9.7	9.9	34
SG Kleinwort Hambros	KH Global Balanced Composite	Composite of Portfolios	Yes	8.01	2.92	23.68
Waverton	Waverton ARC PCI Balanced	PCI	Yes	9	12	35
ARC Research collects the performance of c.350,000 portfolios from 100+ leading investment managers to independently verify their performance figures. Not all companies submit data or subscribe to ARC. Returns as of 31/12/23						
Capital Growth Portfolio (Typically 55-75% equity)						
Wealth manager	Capital growth portfolio details			Data submitted to ARC for verification	% total returns net of fees	
	Name	Product type (Portfolio, Model, Fund, Composite of Portfolios, PCI)	1 year		3 years cumulative	5 years cumulative
7IM	7IM Blended Moderately Adventurous Model Portfolio	Model	Yes	5.6	12.5	34.8
Brooks Macdonald	Brooks Macdonald BPS Medium Risk	Composite of Portfolios	Yes	7.95	5.6	29.2
Brown Shipley, a Quintet Private Bank	SVS Brown Shipley Balanced Fund	Fund	Yes	9.92	-1.86	23.82
Cazenove Capital, Schroders	SUTL Cazenove GBP Growth Fund	Fund	Yes	6.3	7.5	40
Charles Stanley	Dynamic Passive 4	Model	Yes	12	12	39
EFG Harris Allday	Harris Allday GBP Steady Growth PCI	Portfolio	Yes	2.08	1.78	20.6
Evelyn Partners	Evelyn Partners Steady Growth GBP	PCI	Yes	7.19	8.72	30.94
Hawksmoor Investment Management	High Moderate Balanced	Portfolio	Yes	5.7	4.9	26.3
Highwood Financial Services	HWM Profile 5	Model		9.31	11.44	25.48
James Hambro & Partners LLP	James Hambro & Partners Steady Growth Portfolios	Composite of Portfolios	Yes	7.9	8	33.4
JM Finn	CSI Growth Fund	Fund		6	4	30
Julius Baer International	GBP Global Premium Growth	Composite of Portfolios	Yes	11.59	11.76	45.94
LGT Wealth Management	GBP Global Medium High	Model	Yes	7	2	38
McInroy & Wood	McInroy & Wood Balanced Fund	Fund	Yes	5.2	12	41
Meridien Investment Management	Meridien GBP Core Equity with Fixed Income	Composite of Portfolios	Yes	12	20.9	54.9
Nedbank Private Wealth	Nedbank GBP Equity Risk PCI	PCI	Yes	8.57	11.64	33.69
Quilter Cheviot	Quilter Cheviot GBP Growth PCI	PCI	Yes	8.32	6.29	28.44
RBC Brewin Dolphin	BD CC Steady Growth	Composite of Portfolios	Yes	8.74	10.49	38.54
Rothschild & Co, Wealth Management	Rothschild & Co Sterling Balanced Composite	Composite of Portfolios	Yes	12.3	11	42.4
SG Kleinwort Hambros	KH Global Growth Composite	Composite of Portfolios	Yes	9.6	8.94	36.84
Vermeer Partners	Vermeer Partners Balanced Strategy	Fund	Yes	4.4	7.7	0
Waverton	Waverton Private Client GBP Growth Composite	Composite of Portfolios	Yes	13	18	49
ARC Research collects the performance of c.350,000 portfolios from 100+ leading investment managers to independently verify their performance figures. Not all companies submit data or subscribe to ARC. Returns as of 31/12/23						

Wealth manager	Total Offices in UK, CI and IoM	Number of advisers	Number of individual private clients in UK	AUM (£m)		
				Within discretionary	Within advisory	Within execution only
LGT Wealth Management	8	124	33570	24004.27	681.77	1342.71
Evelyn Partners	28	622	180373	46536.69	4518.68	6916.94
Quilter Cheviot	15	236	37000	19725	155	1287
Arbion Limited	1	10	79	1430	136	103
Rothschild & Co, Wealth Management	6	47	1398	13819	205	
RBC Brewin Dolphin	31	453	70000	49212	1572	5012
Highwood Financial Services	1	8	407		309	
Vermeer Partners	1	20	2010	1696.91	130.53	37.29
Julius Baer International	7	64				
Brown Shipley, a Quintet Private Bank	8	71	12289	6001	951	1772
SG Kleinwort Hambros	8	121		5335	692	3837
James Hambro & Partners LLP	4	48	2285	4682	166	705
Rathbones Group Plc	22	704	96300	60268		
McInroy & Wood	3	15	876	1392.4		
Brooks Macdonald	14	98		17236		343
Nedbank Private Wealth	3			463	249	3
JM Finn	5	89	19600	8909	514	1034
Charles Stanley	20	228	31301	14927	1789	2693
Meridiem Investment Management	1	18	490	6816		
Hawksmoor Investment Management	7	26	4195	1043	72	23
Waverton	3	26	3413	10500		
Stonehage Fleming	4	40		9480	3856	529
Cazenove Capital, Schroders	9	254	8875	35139	492	9002
Ruffer LLP	3	40	6000	6000		
7IM	2	20	1919	1576		180
EFG Harris Allday	4	19	4753	1150.62	253.67	217.25

Source: Savanta