

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	Trust & estate planning	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	Cryptocurrency trading	Succession planning
Arbion Limited		X						X	X	X	X	X								X				
Canaccord Wealth		X		X	X			X	X			X			X			X				X		X
James Hambro & Partners LLP					X			X	X	X		X			X			X				X		X
JM Finn		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
Cazenove Capital			X		X			X	X	X	X	X			X		X	X	X	X		X		X
Navera Investment Management Limited					X			X	X			X			X		X							
Rothschild & Co Wealth Management UK		X	X	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
Julius Baer		X		X		X		X	X	X	X	X	X	X	X		X	X	X	X		X		X
Nedbank Private Wealth			X						X					X	X		X	X	X					X
McInroy & Wood					X			X				X			X		X							
RBC Brewin Dolphin		X			X	X		X	X		X				X	X		X	X		X	X		X
Quilter Cheviot		X			X			X	X			X			X		X	X			X	X		
Union Bancaire Privée (UK) Limited		X	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
LGT Wealth Management		X			X			X	X	X	X	X			X		X	X	X	X		X		X
Vermeer Partners		X						X	X		X	X	X		X			X	X		X	X		X
7IM LLP					X				X	X			X	X	X		X	X	X		X	X		X
Highwood Financial Services		X											X		X		X	X			X	X		X
Ruffer					X			X	X			X												
Netwealth					X			X	X			X				X	X	X	X		X	X		X
Rathbones Group		X	X		X			X	X		X	X			X		X	X	X		X	X		

Balanced Portfolio (Typically 35 – 55% equity)

Wealth manager	Balanced portfolio details			% total returns net of fees		
	Name	Product type (Portfolio, Model, Fund, Composite of Portfolios, PCI)	Data submitted to ARC for verification	1 year	3 years cumulative	5 years cumulative
Arbion Limited	PCI Submission Balanced	PCI	Yes	7.88	8.53	31.92
James Hambro & Partners LLP	James Hambro & Partners Balanced Portfolios	Composite of Portfolios	Yes	8	4.5	21
Evelyn Partners	Evelyn Partners Balanced asset	Composite of Portfolios	Yes	6.72	4.72	19.99
Cazenove Capital	SUTL Cazenove GBP Balanced Fund	Fund	Yes	9.4	7.2	24.9
Rothschild & Co Wealth Management UK	Rothschild & Co Sterling Cautious Composite	Composite of Portfolios	Yes	6.4	8.3	28
Julius Baer	GBP Premium Global Balanced	Composite of Portfolios	Yes	9.6	6.36	28.1
Nedbank Private Wealth	Nedbank Private Wealth PCI GBP Balanced Asset	PCI	Yes	6.7	1.99	11.92
RBC Brewin Dolphin	Core and Conviction RCS	Composite of Portfolios	Yes	9.42	9.97	33.16
Union Bancaire Privée (UK) Limited	Global Balanced Strategy	Model	Yes	7.4	4.26	17.06
Brown Shipley, a Quintet Private Bank	SVS Brown Shipley Income A Acc	Fund	Yes	7	-2	14
Vermeer Partners	VP Income & Strategy	Model	Yes	4.15	3.39	18.18
Highwood Financial Services	HWM Profile 4	Model	No	5.88	-0.18	10.5
Canaccord Wealth	CW Risk Profile 4 (AS PER BELOW THIS IS A MODEL AND A FUND)	Model	Yes	6.74	5.04	16.13
LGT Wealth Management	GBP Global Medium	Model	Yes	6.13	-0.8	16.79
Ruffer	Ruffer	Portfolio	Yes	-0.5	-0.22	16.79
Netwealth	Netwealth GBP Risk Level 4	PCI	Yes	7.2	4.3	17.6

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			% total returns net of fees		
	Name	Product type (Portfolio, Model, Fund, Composite of Portfolios, PCI)	Data submitted to ARC for verification	1 year	3 years cumulative	5 years cumulative
James Hambro & Partners LLP	James Hambro & Partners Steady Growth Portfolios	Composite of Portfolios	Yes	9.03	6.03	26.6
JM Finn	YFS JM Finn Progressive Portfolio	Fund	No	9.6	-0.8	23.5
Evelyn Partners	Evelyn Partners Steady Growth	Composite of Portfolios	Yes	7.49	4.24	22.92
Cazenove Capital	Sutl Cazenove GBP Growth	Fund	Yes	11.6	10.2	33.7
Navera Investment Management Limited	Navera GBP Core Equity with Fixed Income	Composite of Portfolios	Yes	9.2	11	47.7
Rothschild & Co Wealth Management UK	Rothschild & Co Sterling Balanced Composite	Composite of Portfolios	Yes	7.59	8.47	33.43
Julius Baer	GBP Premium Global Growth	Composite of Portfolios	Yes	11.87	9.6	39.13
Nedbank Private Wealth	Nedbank Private Wealth PCI GBP Steady Growth	PCI	Yes	8.26	4.09	18.47
McInroy & Wood	McInroy & Wood Balanced Fund	Fund	Yes	0.5	1.3	26.2
RBC Brewin Dolphin	Core and Conviction RC6	Composite of Portfolios	Yes	10.6	12.67	42.33
Quilter Cheviot	ARC Steady Growth QC PCI	PCI	Yes	8.54	3.94	20.3
Union Bancaire Privée (UK) Limited	Global Growth Strategy	Model	Yes	10.3	8.64	28.85
Brown Shipley, a Quintet Private Bank	SVS Brown Shipley Balanced A Acc	Fund	Yes	10	-1	18
Vermeer Partners	VP Balanced Strategy	Model	Yes	4.36	0.42	19.8
Highwood Financial Services	HWM Profile 5	Model	No	9.23	8.55	21.74
Canaccord Wealth	CW Risk Profile 5 (THIS IS A MODEL AND A FUND)	Model	Yes	8.29	6.85	21.46
LGT Wealth Management	GBP Global Medium High	Model	Yes	8.09	-0.11	25.91
Netwealth	Netwealth GBP Risk Level 6	PCI	Yes	10.3	11.7	29.6

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