

The BDM Life 2025

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Introduction

"I created the BDM Life report to address how under-researched the BDM role is, despite its importance to UK providers, and to deliver a genuine deep dive into BDM performance, pressures, motivation and career progression. My thanks to Brendan Llewellyn of Adviser Home for his support in the production of this report. I hope you enjoy reading it."

Gareth is a specialist headhunter with nearly 25 years' experience focused exclusively on Sales and Distribution. In January 2023, he founded **davies marsh**, a boutique search firm, dedicated to connecting high-calibre Business Development Managers and Business Development Directors with investment providers, ranging from global institutions to specialist boutiques.

He brings deep expertise in building distribution channels and is widely regarded as a go-to voice for industry insight, including salary and bonus benchmarking.



Gareth Davies

Founder/Director, davies marsh Ltd

BDMs are a critical but often under-appreciated part of the provider–adviser relationship. This study brings their perspectives together, highlighting strong confidence in their value – with 94% believing they’re essential to adviser businesses – and a clear view of what advisers prioritise: reliability, communication and solid technical knowledge.

The findings also reflect an industry under pressure. Adviser consolidation is the top concern, access to firms is still challenging and competition between providers continues to rise.

This report captures those realities and offers a concise snapshot of what defines the life of a BDM today.



If you're a Head of Distribution looking to strengthen your team, or a BDM or BDD considering your next move, Gareth would be delighted to connect: email gareth@daviesmarsh.co.uk or scan the QR code to connect on LinkedIn.

"Gareth's knowledge of the industry and client and candidate needs is second to none. I always recommend Gareth."

Gemma Howard

"Gareth offered a great process from start to finish and kept me aware of every detail."

Scott McNiven

"Gareth was a great help in my search for a new role. Communication was excellent."

Oliver Beckett

"Excellent advice and help from Gareth. A thorough professional who genuinely cares."

Gethin John

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Executive overview

Executive Overview

It is rare to see aggregated cross market views from BDMs – the trade papers rarely carry their opinions, so we feel this study plays an important role in giving a voice to this crucial link between provider and adviser. Research was carried out on a self select, confidential basis. Respondent split was 84% male, 16% female.

Headline points:

- BDMs are rightly confident of their own worth – with 94% believing in their own importance to adviser's businesses.
- BDMs consider that advisers value "Reliability" above all – with "Communication Skills" and "Personal Relationship" next
- In terms of specifics – "Technical Knowledge" comes top followed by "Troubleshooting" and "Adviser Business Understanding"
- BDMs spend most time on emails, phone and virtual calls
- As their job title suggests BDMs spend most time on business development with advisers
- Adviser consolidation is BDMs biggest concern and adviser decision making (panels, etc.) their biggest challenge
- What motivates BDMs? Financial reward and helping advisers
- BDMs are positive overall about their distribution team's response to diversity
- 70% of BDMs could approach their manager about mental health issues
- Overwhelming majority – 86% of BDMs see AI as an opportunity
- What might cause BDMs to leave their employer? 69% say financial package
- Average BDM salaries and bonuses are broken down into specific categories
- What would BDMs like to see from their advisers – many things but open communication is the main theme
- BDMs nominated a very wide range of advisers as "best to deal with"

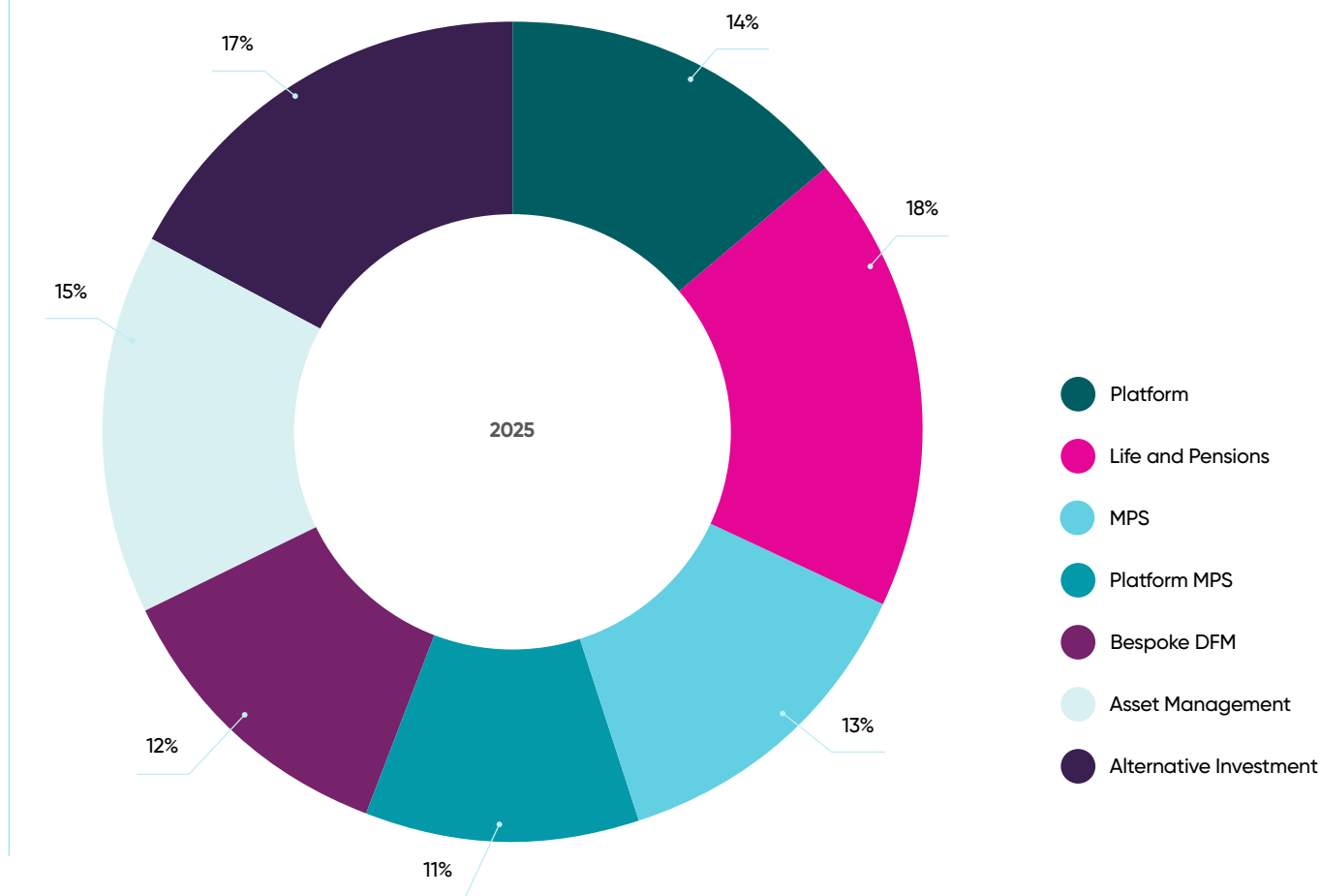


In-depth on BDMs



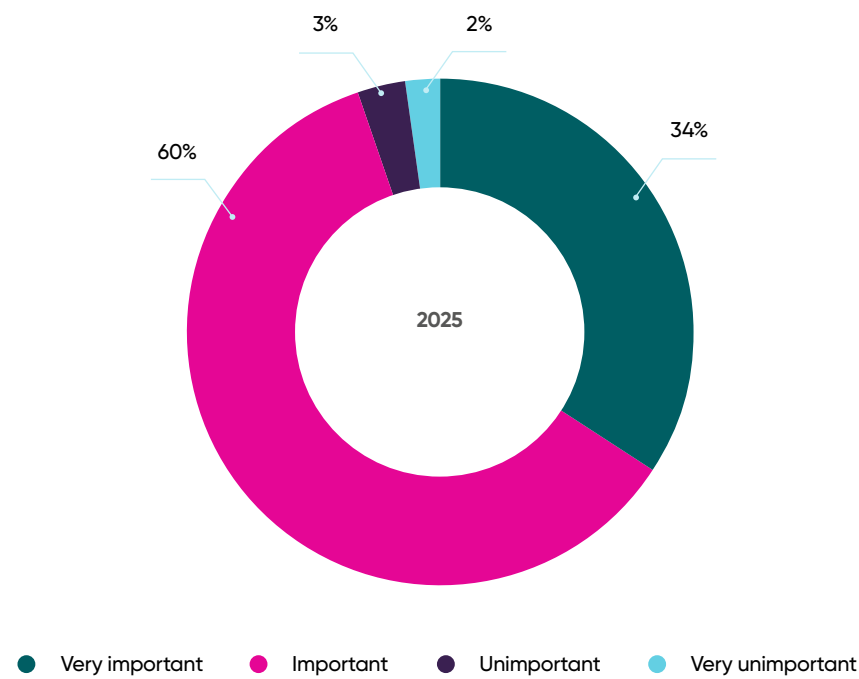
In-depth on BDMs

What type of employer
do BDMs work for?



How important are BDMs to an adviser's business?

Once again there is a confident stance from BDMs with 94% asserting their importance to an adviser's business. Looking inside these headline figures, clearly where a BDM deals actively with an adviser then they will be very important to their business.



What do advisers look for in a BDM?

BDMs were asked to highlight up to three key qualities. Reliability came out firmly on top, with only 1% not selecting it. Personal relationships and communication skills followed closely, scoring 69% and 66% respectively. In many ways, "personal relationship" absorbs elements of empathy – a vital trait in the role, even if it doesn't stand out as a single, standalone characteristic.

Reliability	99%
Personal Relationship	69%
Communication Skills	66%
Empathy	29%
Ability to challenge them/their colleagues	22%
Enthusiasm	21%

What do BDMs think advisers value most from them?

Technical knowledge clearly takes top place followed by support with clients and troubleshooting competing for second place. Whilst there are still a few “generalist” providers it’s advisers that most commonly carry out a generalist role and so naturally need more specialist support from providers and in particular BDMs. They were asked to rank these five traits in order of adviser priority.



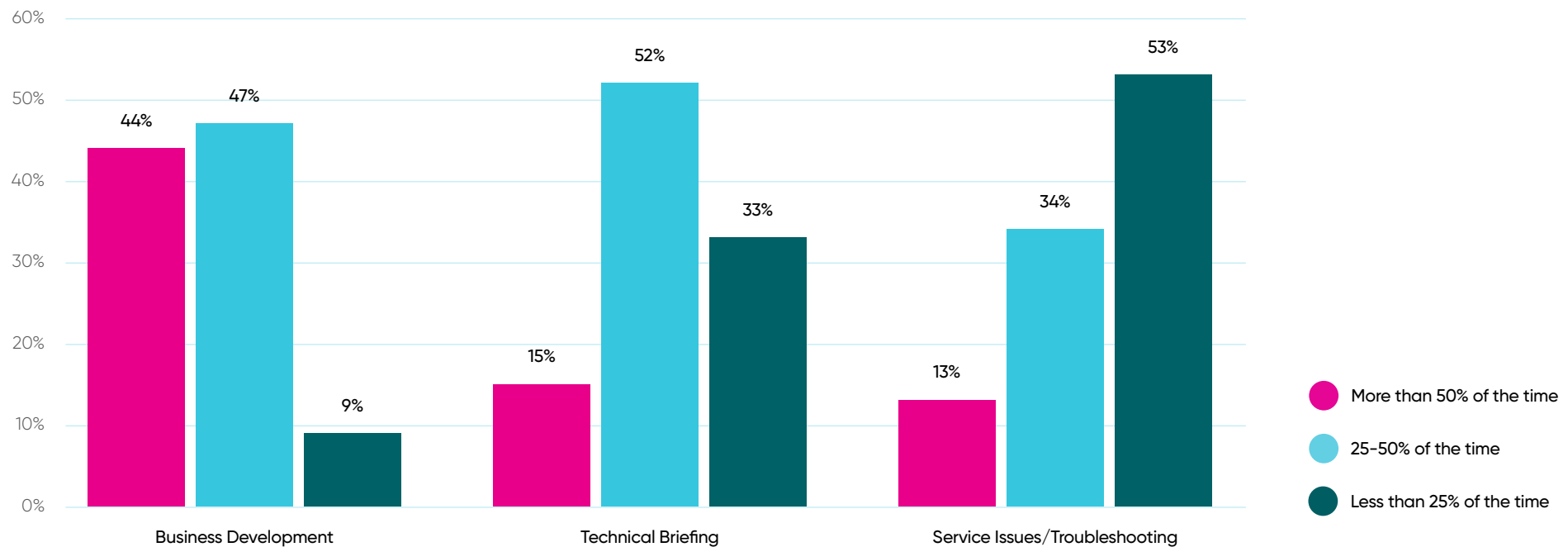
How do BDMs spend **most of their time?**

BDMs spend the bulk of their time managing emails, followed by virtual calls and general phone activity – which is to be expected in well-established adviser relationships. In-person meetings with advisers still play a key role, with 29% saying these account for over a quarter of their working week. And with most BDMs operating remotely, it's no surprise that internal meetings with colleagues sit at the bottom of their time allocation.

	More than 25%	11–25%	5–10%	Less than 5%
In person meetings with advisers	29%	44%	16%	11%
Phone activity	40%	41%	13%	6%
Virtual calls	43%	44%	11%	2%
Sending/dealing with email	49%	41%	9%	0%
Meeting colleagues	7%	16%	45%	32%
Admin	21%	33%	37%	9%
Travelling	14%	36%	35%	15%

How do BDMs spend their time with advisers? – What kind of agenda?

It's reassuring to see that "Business Development" accounts for the majority of adviser meetings with 44% of BDMs saying they spend at least half their time with advisers on this subject. To an extent of course, "Technical Briefing" goes hand in glove with business development.



What single thing would BDMs like to see from advisers?

We had a fantastic response to this question with BDMs opening up about how they feel the business relationship between them and advisers could be improved. The responses can be broken down into four areas with one stand out suggestion.

1

Openness & Honesty

Overwhelmingly the strongest theme by far. BDMs want advisers to be upfront about intentions, honest about proposition fit, be open to new ideas and transparent about the challenges they're facing or reasons for not engaging.

2

Better Communication & Engagement

This includes timely responses, clearer pipeline visibility, early notice of cases and following through on meetings or event commitments. BDMs feel that good communication is the foundation of an effective partnership.

3

Respect for Time, Effort & Value

BDMs want recognition that they're strategic partners – not just product reps. That means respecting schedules, engaging constructively, and allowing access to the right people when needed.

4

Willingness to Explore Change & New Solutions

A big underlying message is that many advisers stick to old panels, legacy assumptions or familiar providers. BDMs want:

- Open-mindedness around new investment solutions, ideas, tax-efficient options.
- Willingness to rethink existing propositions.
- Freedom from "we've always done it this way" thinking.
- This theme is about growth – on both sides.

Individual comments:



"An area that I would find useful is advanced notice of cases that are coming up. A lot of the time we are in contact here and there, but the onus is on us as BDMs to keep visibility on cases. If we were given an active heads up, it makes it a lot easier to keep people aware of discounts on products and ensuring that our Client on-boarding team are able to process investments in a timely manner."

"Clear communication about the status of potential cases."

"More referrals."

"More openness about their plans and motivations for their action."

"Be open to listening and willing to change."

"A single thing that would help me is better communication from potential new clients. I would prefer to know if there's an opportunity to work together or not. If not, then we can shake hands & move on."

"Some opportunities drag on for too long."

"More humility and recognising they sometimes get it wrong."

"Turn up to events if you register."

"Open to discuss specific clients."

"Honesty about usefulness of product/service."

"Open dialogue. Honesty with needs and intentions. Would help me be far more effective for them ... and turn up to events when they sign up!"

"Learning to know where to go for issues that can be resolved by my support colleagues."

"Being open to a consultative process."

"Being more open to discussion with firms you haven't traditionally supported. Propositions change, regulations and tax landscapes change. Hear us out and we promise not to bug you."

"Pipeline updates."

"Opportunity for more face to face meetings with IFA firms so they can make a better decision on investment solutions for the underlying client."

"Fast decision making."

"It's nice to have honest feedback on our approach and proposition when firms choose another offering. Also a direct yes/no is much better than being ignored."

"Openness to new ideas/funds."

"Willingness to change their proposition to benefit their clients."

"Recognise that outside of my proposition I can add value and efficiency to their business and help drive good outcomes for clients."

"Send fewer emails – pick up the phone instead."

"More open and honest conversations regarding the stresses Advisers face on a daily basis. Sometimes I feel that ego and a sense of pride in the business can stop some from being honest about struggles they face and areas of the market they may not be best serving their clients in."

"If an adviser is not interested be honest, don't waste a BDMs time by using them and their resources and then not give them any business."

"Sharing barriers to their goals/ achievements so I can support them to achieve where they want to be."

"Engagement and honesty about whether they want to work with us. Too many unreturned phone calls/ meetings with promise and no results."

"Embrace Tax Efficient Investments."

"More business."

"Allow me the time to talk to them."

"More open to see me."

"Openness."

"More assets!"

"Be more open and honest."

"Returning calls and responding to emails."

"Open and proper due diligence process."

"Open-minded to the solution for their problems, can be very averse to change."

"Not being dictated to by a panel that was set up by someone else in the business."

"Always reply to emails/phone calls."

"Patience."

"Input into how I can more effective, enabling me and my firm to deliver solutions and service that makes a difference to their business and their clients."

"More business."

"Take the time to understand products/solutions and consult with BDMs as part of the research/due diligence/planning process. Much easier to prevent problems before they happen than resolve them thereafter."

"Openness to discuss new opportunities and to help BDMs understand their issues."

"More engagement both positive and negative."

"Willingness to change (allowing themselves the time to consider change)."

"Be open minded to new ideas. Don't be fooled by 'bigger is better'."

"Willingness to engage with new ideas."

"Details of their back books."

"Communication with us."

"Be willing to let you have access to the right people in the business to be able to support them – being able to contact them successfully."

"A continuation of honesty and 2-way sharing of where we can add value."

"Honesty, we're not offended, just tell us if we are wasting our time trying to promote something with you."

"Giving us an insight into exactly what they need from them as early as possible as every firm has different needs and priorities. Also, appreciating that we have meetings too – which does mean we're not always available on the phone instantly."

"Be open to discussions around product quality."

"Mutual respect."

"Willingness to realise that BDMs can provide valuable support and are no longer just pushing products."

"Be open minded."

"More commitment to spend time with providers. There is an arrogance that they know everything but absolutely this is not true and they need more time with each provider to become truly expert."

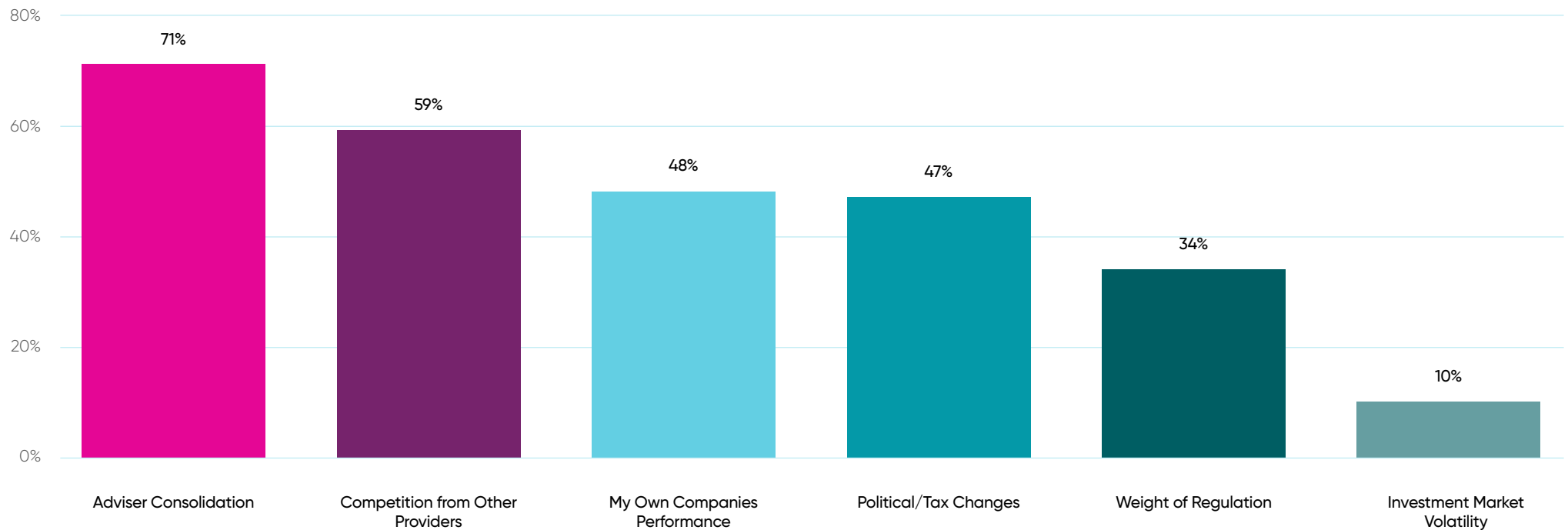
"More understanding around service challenges."



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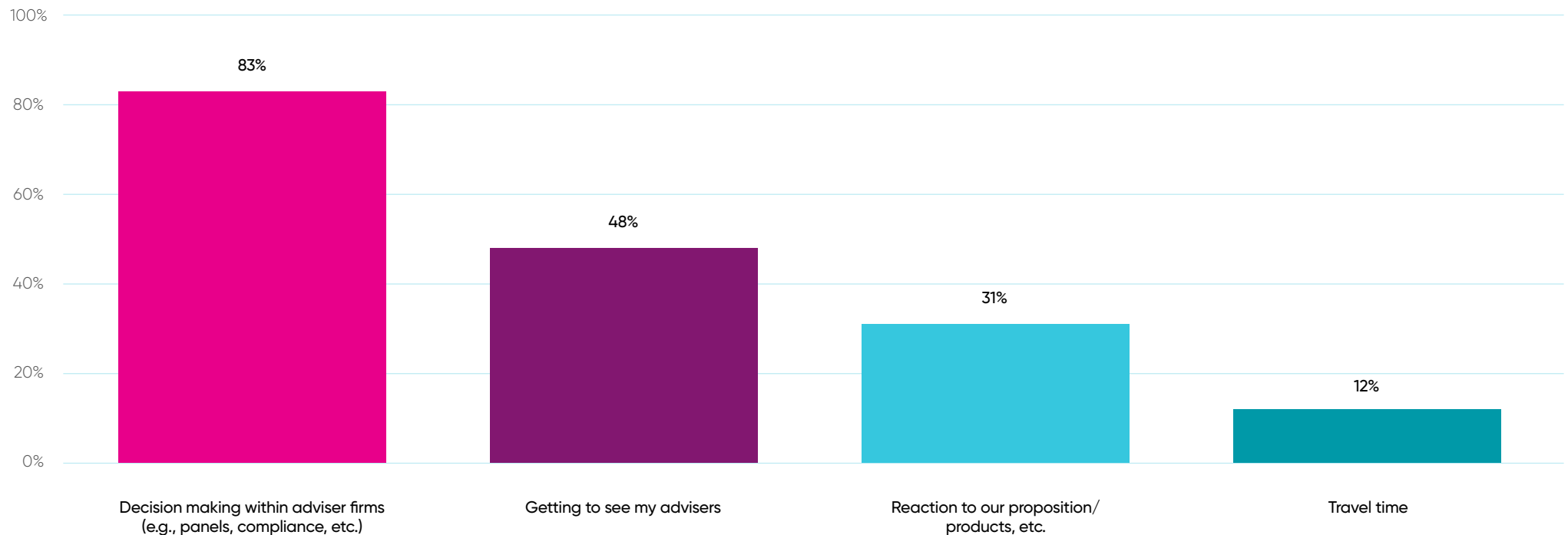
What are BDMs major concerns on the business environment?

Top concern at 71% is "Adviser Consolidation". This has been a theme for the last few years and BDMs are experiencing this as a material contraction in their available market. Normally regulation is towards the top of the list but a change of government and the prospect of tax changes has created concern. Second top concern though is "Competition from Other Providers". It may not seem it to BDMs but this is a good sign – the independent adviser market thrives on a good number of providers competing for business. BDMs were asked to select up to three responses.



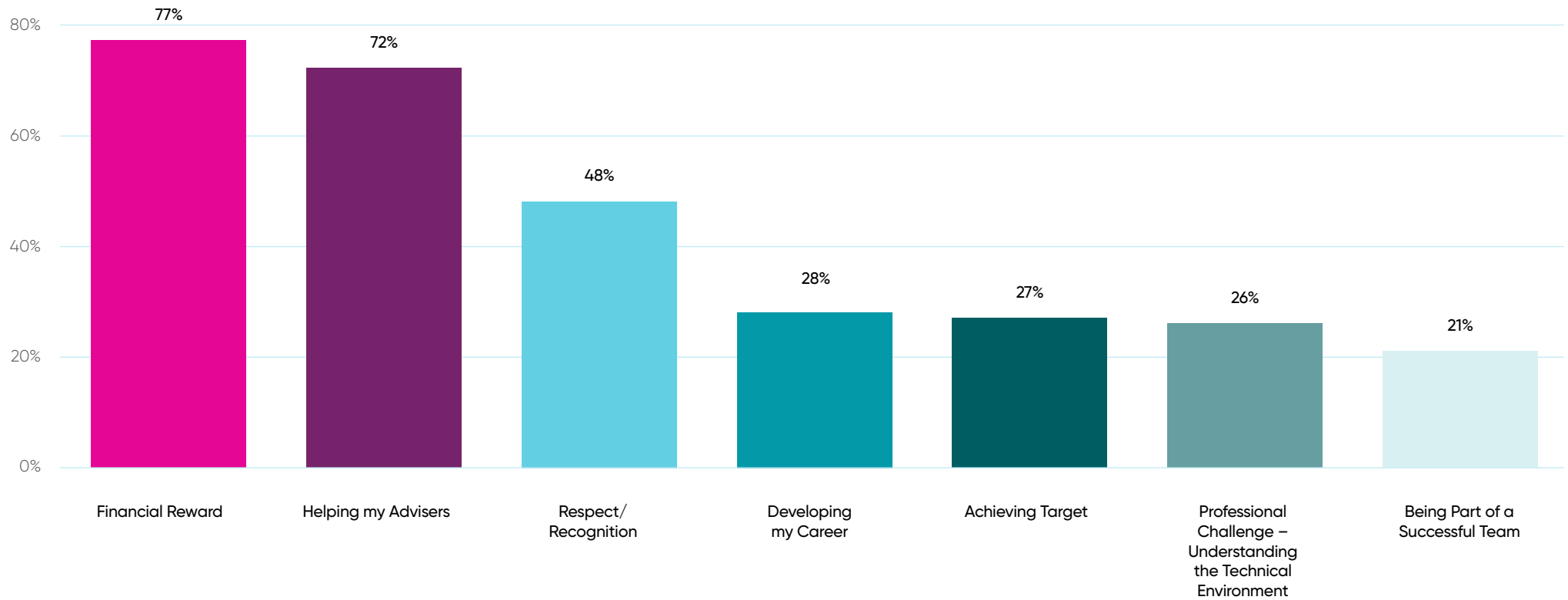
What challenges do BDMs have working with advisers?

Partly driven by consolidations, adviser practices are becoming more complex in their decision making processes and BDMs clearly feel that this presents a challenge with multiple hurdles to achieve and sustain a panel position. "Getting to see advisers" also remains a problem for many BDMs (48%). Of all these challenges, the one where providers could help their BDMs is around reaction to proposition – whether by looking at training or marketing communications or indeed reassessing the proposition.



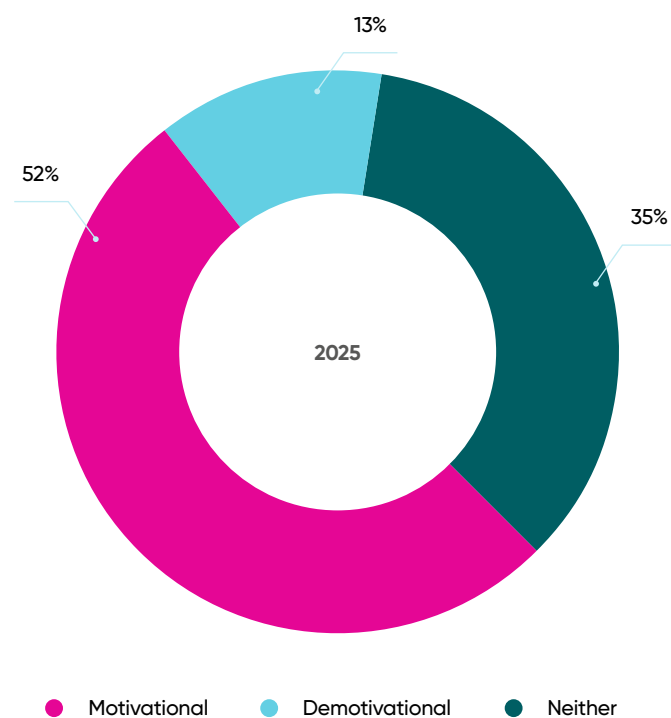
What motivates BDMs?

BDMs take motivation from a variety of sources with "Financial Reward" and "Helping my Advisers" topping the list. Interestingly "Achieving Target" isn't a huge motivator even though it must correlate closely with "Financial Reward". BDMs were asked to select up to three options.



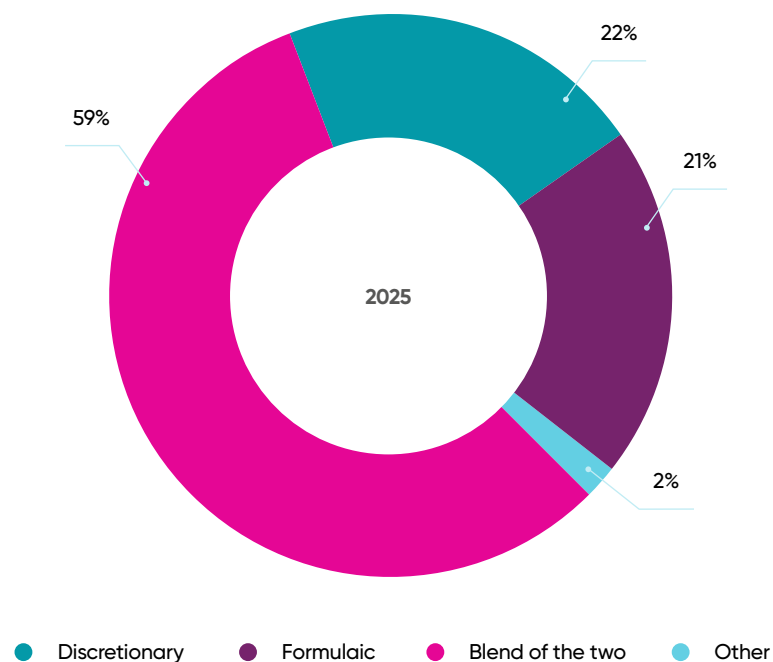
How motivated are BDMs to revenue targets?

Despite the responses to the last question here we see that revenue targets are motivational and only 13% see targets as demotivational.



How are BDMs bonuses calculated?

59% of BDMs have Blended Bonus Schemes.





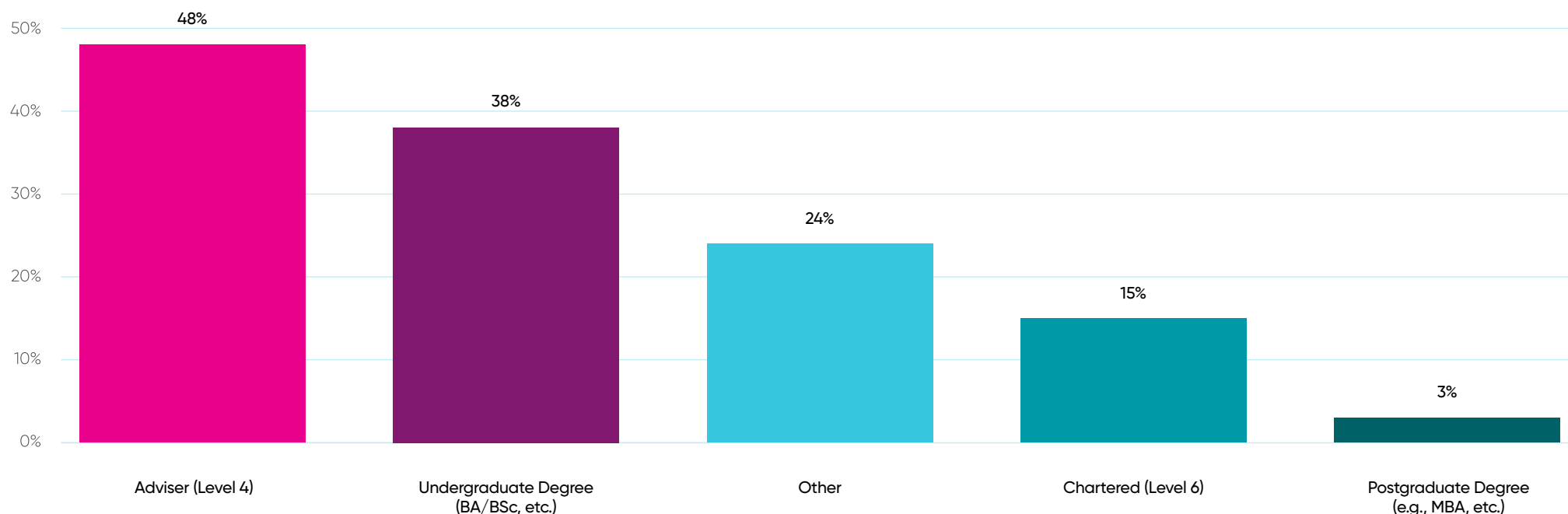
Earnings and Qualifications



Earnings and Qualifications

What qualifications do BDMs hold?

BDMs typically have a range of qualifications, and we note that the majority (63%) have taken and passed the Adviser qualifications. This may be partly to create the option of a career change but its also worth noting there are no industry regulatory required qualifications for BDMs and the Adviser exams are probably the best fit – they also allow the BDM to see things as the adviser does.



An analysis of **BDM Earnings** – Basics & Bonuses

Asset Management

BDMs have retained top spot again with the highest basic salary at **£116,875** – albeit 7% down on 2024 levels. Interestingly, Asset Management bonuses have increased by nearly 25% to **£67,143** (ranking in 2nd place).

MPS

BDMs have seen basics increase by 10% to **£92,000** with their bonuses increasing to **£28,833** (although ranking bottom of the league table in 7th place).

DFM

BDMs earn on average **£91,000** which is almost identical to 2024 at £91,500). Bonuses have increased by 15% to **£45,040** – ranked in 3rd place.

Alternative Investment

BDMs average basic is now **£90,772** up slightly from 2024 levels. They still top the table for bonuses at **£70,861** per annum!

Platform

BDMs earn **£90,222** (very similar to 2024 levels) but with average bonuses up by 81% to **£34,444**.

Platform MPS

BDMs is a new category this year. It ranks 6th for basic salary **£79,563** and 5th for bonus earnings **£36,731**.

Life & Pensions

BDMs basics have remained almost unchanged from 2024 levels averaging **£75,828** with bonuses up by 37% to **£42,413**.

BDM Earnings – Basics & Bonuses

This analysis highlights the variation in earnings across financial sectors, with “Asset Management” leading in basic salary and overall earnings, while “Alternative Investments” ranks highest in average bonuses.

Ranked by basic salary

1st	Asset Management	£116,875
2nd	MPS	£92,000
3rd	DFM	£91,000
4th	Alternative Investment	£90,772
5th	Platform	£90,222
6th	Platform MPS	£79,563
7th	Life & Pensions	£75,828

Ranked by bonus

1st	Alternative Investments	£70,861
2nd	Asset Management`	£67,143
3rd	DFM	£45,040
4th	Life & Pensions	£42,413
5th	Platform MPS	£36,731
6th	Platform	£34,444
7th	MPS	£28,833

*Car allowances (where applicable) were added onto the basic salaries.



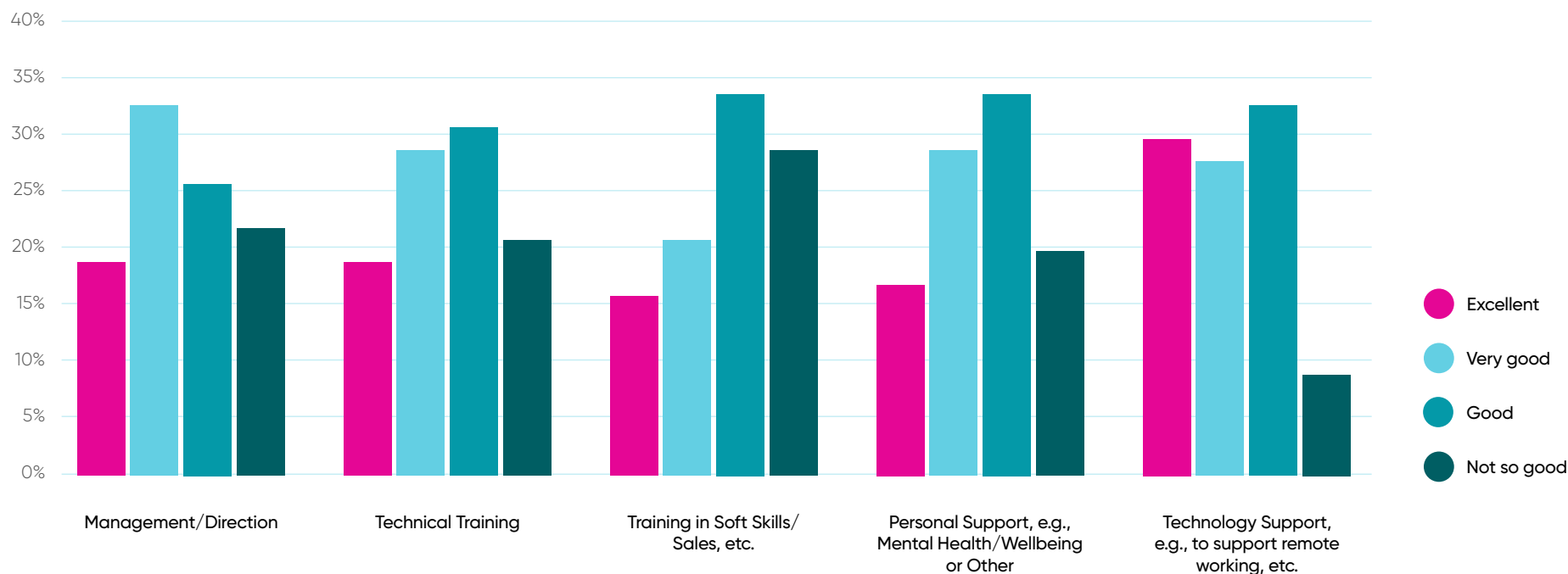
Employer Support



Employer Support

How do BDMs rate employer support?

The most highly rated aspect of employer support comes in the form of "Technical Support", e.g., to help with remote working. Other support areas are also well received but with around a quarter of BDMs rating them "Not so Good". Soft Skill training remains the least rated but only marginally so.



BDM comments on employer support:

As always communication is a theme here including interesting ideas on the adviser feedback loop and influence on decisions.



"Not much internal training available to BDMs at any places I have been. I follow TRUST3D."

"My company has had various changes over recent years so top level management has been varied. However, my line boss has been superb."

"The firm have made it clear they do not want employees/management who are toxic to the company. This is very important to me and the reason I joined."

"Don't need much training, just support when needed."

"Only recognised in last 12 months as a factor in job. WFH biggest issue."

"Undertake a significant amount of additional reading in areas that can help me help my accounts."

"Small business with small team and little structure."

"Bringing in outsourced training expertise has transformed my skill set and I have a clear plan of attack in my daily work life."

"My only feedback on this would be (industry wide) I'm not sure senior leaders always understand how much is on us."

"Plenty of material on wellbeing but requests to work to suit own life stage such as part time dismissed as not possible as employer perception is that advisers expect us to be available 5 full days a week when reality is they don't – locally not good wellbeing adherence."

"Advisers place on service and service issues. If we can't get service right, it doesn't matter how good a proposition is or what it costs, advisers won't support as heavily if they are aware service is bad."

How do BDMs rate their distribution team's response on Diversity?



**Nearly 90% of BDMs
say their employers are
performing strongly when
it comes to recruiting with
diversity in mind.**



**Only a small minority feel
things are either superficial,
slow-moving or still not
evident in practice.**

Individual BDM comments on Diversity:



"Looking at my team we have hired people from a range of backgrounds, a core part of our hiring process is company fit which I think has naturally lead to a very diverse team."

"Hiring decisions are absolutely based on values alongside ability, to ensure culture fit. We do lots of workplace training and diversity and inclusion too."

"Open to all new comers regardless of race, gender, etc."

"Treat everyone the same."

"Hires a diverse team."

"We try to employ the best individuals – that provides us with a mix of experience for a diverse team."

"Standard stuff. Not quite just box ticking, but also not moving the dial with anything meaningful."

"Diversity is part of the recruitment process."

"Certain controls in place at executive level."

"Encouraging all to contribute and listens to us making us feel valued, no matter who we are."

"Open-minded and encouraging."

"Our industry struggles with this as a whole, it's very pale, male and stale unfortunately."

"Actively recruit diverse and complementary skill sets."

"Fair opportunities to all colleagues."

"We aim to have a diverse team."

"Hires the best people, regardless of bias (age is a great example)."

"Our industry struggles with this as a whole, it's very pale, male and stale unfortunately."

"Mix of backgrounds and ethnicities."

"We hire the best people who can best do the job. We don't concern ourselves with targets on DEI."

"Lots of diversity schemes."

"Collaboration and mentoring to develop growth and trust."

"We have made significant strides in its DE&I efforts over the past few weeks, with Graduate Schemes, 100 Black Entrepreneurs schemes, Female Folio and I2020 and other DE&I focused initiatives. Our Distribution team, though not particularly racially diverse, is levelling out in terms of gender diversity."

"Really positive and inclusive environment."

"Employs people of different sexes and socioeconomic economic backgrounds."

"Actively where there is imbalance."

"Big emphasis on this when looking at hiring and promoting within the team."

"The company I'm in has the most diverse group of people a part of it. You can tell from the creative and outside the box thinking and openness to ideas."

"We are an equal opportunity employer who looks for the right individual to fulfil any role. It's skill-set and mind-set rather than personal preference."

"All are welcome and all opinions taken on board."

"Applications from minorities are encouraged."

"Fantastic culture internally, I can't fault them on diversity and inclusion."

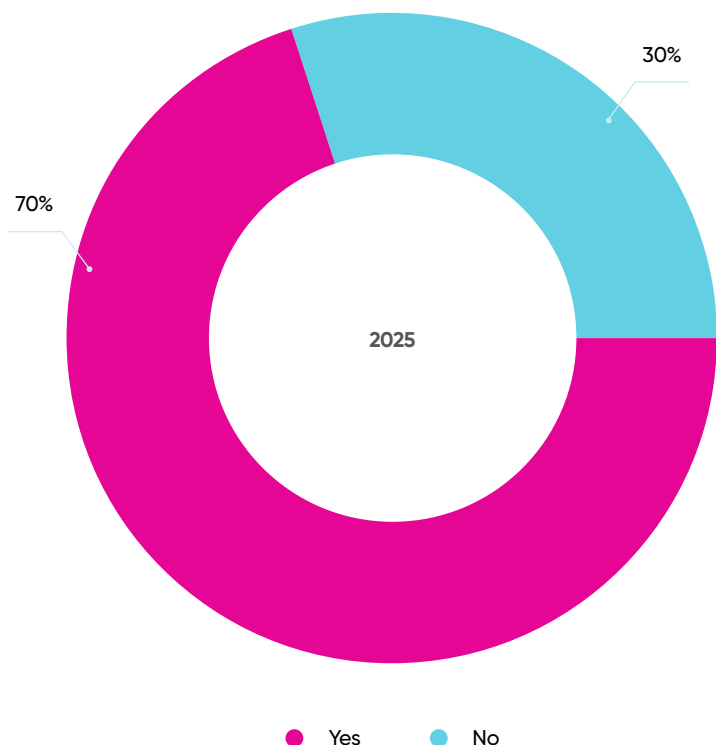
"We have made a conscious effort to employ more women in the team."

"We already have a diverse team."

"Seems to be aware of it and its deemed visible but not sure its borne out in practice."

Could BDMs discuss **mental health challenges** (such as anxiety or depression) with their Manager/Director?

Most BDMs feel they could approach their manager about mental-health challenges if needed. That said, 30% don't believe they could have that conversation – and that's a worryingly high number. The irony is that many Heads of Distribution may well be open and supportive, but what really matters here is the "perceived" attitude of leadership towards this subject.



"There is an avenue to do this that I know some of my colleagues have used."

"There is a support mechanism in place on a broader business basis."

"Some of my recent issues involve the behaviour of my manager so definitely not."

BDM nominations for employer support on **mental health and well being**

*Interesting observation that just 15% of responders actually wanted to nominate their employer. Certainly, room for improvement!

Two nominations for:

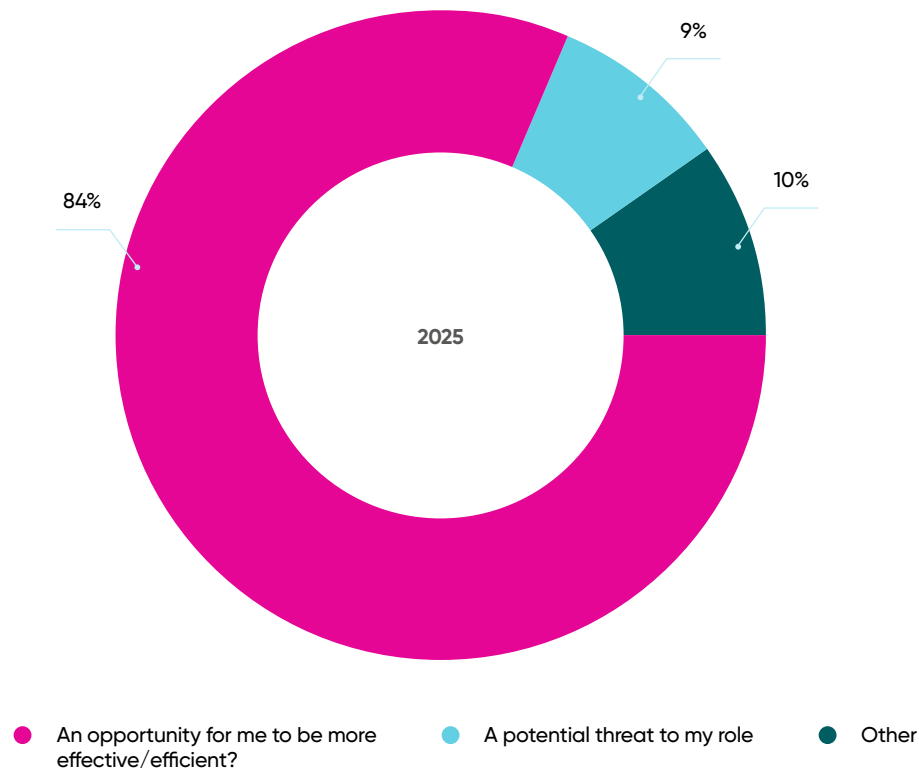
octopusinvestments

Ψ PUMA INVESTMENTS

**QC
QUILTER CHEVIOT**

Is AI an opportunity or threat to BDMs?

There is much talk in the market and the media as to the potential impact of AI so it is good to see that BDMs see AI as positive – a chance to be more effective and/or efficient. Only 9% see AI as a potential threat to their role.



Comments on AI impact

84% of BDMs see AI as positive with 6% seeing it as a threat – and 10% making other comments as below:

"Relationship-led roles and those that are more judgemental/require EQ will only increase in importance as so the strength of my type of role and it's commercial value will only increase as AI advances in other areas of the industry."

"Both a threat and an opportunity to be used with caution, always check its content."

"Personal relationships, accountability and sales conversations are here to stay. I see enormous value for certain roles/tasks."

"AI is about both opportunity and threat but generally I feel that it can be used effectively to a point but then the individual has a significant part to play in ensuring that AI is used in the right way."

"My company is looking at ways they can adopt and provide AI tools to aid efficiency."

"Something that people are using more and resulting in laziness and corner cutting."

"Undecided and open minded. Waiting to see how this progresses."

Why would BDMs move to another company?

A pretty clear response here – “better financial package” might lead BDMs to change employer. This is significantly more than double the other responses. A nudge here to employers to check the competitive standing of their BDM package.

More challenging BDM opportunity	27%
Better financial package	69%
Opportunity to work in distribution management	28%
Opportunity to work as an adviser	26%

BDM comments on why they might leave their job:

“An interesting start up.”

“Redundancy!”

“Maybe a part time role somewhere in the future either as a BDM or an adviser.”

“Confidence in leadership and good people to work with.”

“Boredom as just unable to get to see advisers who I have on panel anymore and so much time wasted chasing rainbows that I don’t feel relevant to my advisers anymore – times have changed and we as a provider haven’t.”

“Any prolonged uncompetitiveness of my employer.”

What single thing would BDMs like to see from their employers?

There is a wide range of requirements here – main themes include more salary and or bonus and a request for more autonomy with the idea that activity-based targets don't match well with advisers own requirements.

1

Better Tech, Systems & Operational Support

This is the loudest message. BDMs want:

- Stronger IT systems and workflow tools
- Better real time MI/data
- More admin support and telephone BDM help
- Fewer internal meetings and less admin friction

Make it easier for BDMs to do the job well.

2

Fair Pay, Realistic Targets & Recognition

A big theme around feeling undervalued:

- Higher basic salaries
- Bonus schemes that reflect performance
- More realistic and achievable targets
- Progression and development opportunities
- Recognition of the current market realities

The sense is that expectations remain high while reward has declined.

3

More Autonomy & Trust

BDMs want to be treated like experienced professionals:

- Less micro-management
- Freedom to manage time locally
- Moving away from blanket activity targets
- Trust to work with advisers in the way that actually generates business

This is about empowerment rather than control.

4

Clear Strategy, Better Leadership & Listening

Many comments point to a desire for direction and genuine engagement from leadership:

- Clear priorities and communication
- Taking feedback from the field seriously
- Product development that matches adviser needs, not internal assumptions
- Stronger training plans
- Innovation and willingness to adapt

BDMs want to feel that decisions align with reality on the ground.

Individual comments:



"More competitive basic salaries."

"Easier access to a vehicle as I don't own a car."

"More support staff."

"More training on soft skills."

"Better IT systems."

"Better communications for technology development. We do lots but are not very good at telling our customers."

"More AI tools."

"Quicker decision making – policy statements on key issues."

"Taking on feedback from the sales team on comms and product."

"Better support from management."

"Clear direction on what are the focuses."

"Better legacy servicing."

"Less admin burden."

"Appt booking with good firms."

"More ability to make decisions locally. Give us more franchise in how and when we spend our time. Move away from activity targets."

"Empathy."

"A telephone BDM to make appointments."

"Less micro-management, more autonomy."

"Sales training."

"Devise a plan/strategy and listen to the BDM team."

"Remuneration, there has been a significant downwards trajectory of bonus/ remuneration over the last few years, despite stellar flows and activity within the team."

"Realistic, achievable goals, whilst recognising the achievements made."

"More basic salary."

"The trust to do things my way."

"Price reduction."

"Innovation."

"Less internal meetings."

"Salary increase."

"Listen to market research."

"Extra resource."

"Get the internal systems right. Performance of products will always help too!"

"Employ more BDMs."

"Provide a bonus scheme."

"Admin support."

"Development to enable a real growth strategy."

"Better data/MI and a specialist team to manage and optimise this."

"Less pressure on fixed activity standards. Having a set amount of appointments doesn't guarantee business. Working with advisers the way they want to is how it's done. Less advisers see the value in face to face appts when it comes to time management."

"Wider appreciation of the advice market and not just our sector."

"Continued product development."

"Being realistic with our products that are new that money isn't going to flood in on day 1. Also creating products that advisers want, not what is just good for our business."

"More autonomy."

"More staff in key roles."

"An implementation of a robust training plan for new starters in the distribution team."

"Acceptance and understanding that the market has changed and we need to move quickly with it and not be asking us to focus on contacting advisers who have and won't ever want to use our products."

"Keep up with and be ahead of the rapidly developing tech and market competition."

"Faster change implementation."

"A distribution strategy that aligns with their growth expectations for MPS."

"Moving away from volume based targets. The adviser landscape no longer supports this approach in my opinion."

"Installation of a proper workflow system."

"Personalised literature for adviser firms."

"Understanding we need support with service to enable us to use our time more effectively. Invest in people in this way and the new business results will naturally more than cover the costs longer term."



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Advisers receiving individual nominations



Advisers receiving individual nominations

We asked BDMs to nominate their best adviser to deal with:

Most BDMs nominated here and its good to see a range of firms by size and in most cases with individuals nominated.

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- | | | |
|---|---|---|
| <ul style="list-style-type: none">• Aaron Brann – Financial Advice & Services• Adele Cable• Adrian Ringrose – Evans Hart• Alasdair Walker – Optimum Path• Alexander Calder – Futures Assured, Tozer LLP• Andrew Troughton – Independent Investment Associates• Andrew Tyson – Lincoln FS of Lincoln• Andy Wheeler – Elevation• Barry Richards – Bourne IFA• Ben Maggs – Ethical Investors• Ben Pegler – Finli• Callum Drummond – KDW• Catrina Walker Jones – HWIFM• Charlie Beck – Blackbear Financial Group | <ul style="list-style-type: none">• Chris Anderton – Acumen P&I• Chris Hindle – Frazer James• Chris Jones – Whittaker financial• Chris Palmer – Hansford Bell• Chris Skidmore – Ethical Investors• Chris Spear – Spear Financial Services• Church Gates• Coloma Wealth• Craufurd Hale – PM Wealth• Dan Lawrence – PM Wealth• Darren Wallbank – Ginkgo Financial• Darrell Stone – Continuum• Darren Harness – Harness Wealth• Dave Dean – Finli• David Carter – Absolute | <ul style="list-style-type: none">• David Parnell – DP's Financial Advice• David Thompson – Acumen P&I• Eamonn Prendergast – Palantir• Ewoud Karelse – Evelyn Partners• Gary Prewett – Finli• Gareth Heath – Crocus• Gary Franklin – Vision• Gretchen Betts – Magenta• Humaun Rashid – Ascot Lloyd• James Corcoran• James Mackay – Frazer James• Jason Williams – Ruby Financial• Jim Stokes – Fulwood Wealth Management• John Pullin – Alan Boswell• Jon Hills – Perspective |
|---|---|---|

- [Kevin Morrison](#) – 20/20 WM
- [Kevin O’Kane](#) – First Wealth
- [Kevin Troy](#) – Financial Relationships
- [Kevin Walsh](#) – Home and Finance
- [Lee Clayton](#) – Clayton Holmes Naisbitt
- [Lee Rebbeck](#) – Oyster Financial
- [Lindsay Roberts](#) – Roberts Keen
- [Loveday & Partners \(Titan Wealth\)](#)
- [Lumin, Morgans Independent and First Wealth](#)
- [Marcus Paine](#) – Modern Money
- [Martin Card](#) – Turpin Barker Armstrong
- [Martin Taylor](#) – Schroder Personal Wealth
- [Matt Pathmanathan](#) – AMG Wealth Solutions
- [Matthew Keen](#) – Roberts Keen
- [Max Sullivan](#) – Archgate Wealth
- [McGraw Gregory](#) – True Potential
- [Michael Cooper](#) – Watermead Financial
- [Michael Price](#) – Price Ferguson
- [Michael White](#) – Capital Wealth Partners
- [Mike Kennedy](#) – Homecroft
- [Naomi Dickinson](#) – Bluestone

- [Nick Aslam](#) – Henson Aslam Financial Services, Nottingham
- [Nick Musselwhite](#) – Struan Wealth Management
- [Nick Ryan](#)
- [Owen Morgan](#) – Romilly IFA
- [Paul McFarlane](#) – Harvest Associates
- [Paul Urmston](#) – 2 Plan
- [Peter Smith](#) – Merlin Wealth
- [Phil Denton](#) – Which Way FS Melton Mowbray
- [Phil Jones](#) – Forrester Boyd WM
- [Phil Jones](#) – Lloyd & Co
- [Robin Magill](#) – Magill & Co Ltd
- [Roger Jackson](#) – FMB
- [Ross Biddiss](#) – Hansford Bell
- [Ross Stevens](#) – Foster Denovo
- [Ross Taylor](#) – Taylor & Taylor
- [Russell Vidler](#) – Purple Patch Financial Planning
- [Scott Davis](#) – 3D Financial Planning
- [Scott Webster](#) – Gavin Carr IFS
- [Simon Farrant](#) – Argentis Wealth Management

- [Simon Rigby](#) – Rigby Financial
- [Sire Ltd, Lumin Wealth & Pelham Financial](#)
- [Smith & Pinching](#)
- [Steve Baxter](#) – Blackbear Financial Group
- [Steve Burchnall](#) – Pharos
- [Steve Jarman](#) – S J Financial Advice
- [Steve Walker](#) – Thompson Jenner Financial Services
- [Steve Whiteway](#) – Ind Asset Co.
- [Stu Dewin](#) – Questa FS
- [Stuart Foden](#) – FMS Sevenoaks
- [Suzanne Browne](#) – Pure Wealth
- [Symon Parkin](#) – Ind Asset Co.
- [Tom Hearnden](#) – Edenhurst WM
- [Tony Clements](#) – Lothbury Wealth Management
- [Tracy Summerfield](#) – Eames Laurie
- [Trevellyan Ward & Rob Coote](#) – Atkins Ferrie Wealth Management
- [Vaughan Watson](#) – Altor WM
- [Watson Moore](#)



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