

BDM Benchmark 2024

A comprehensive look at how advisers rate BDMs

Published April 2024



Overview and Method

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This BDM Benchmark expands on the 2023 edition and is based on views from UK advisers – recruiting respondents via e-comms and social media across February and March 2024.

We believe it to be an important study – the BDM is an essential link between adviser and provider. For the latter the BDM is the core distribution resource and an invaluable source of market feedback. For the adviser the BDM can be a technical hub, an ideas bank and a trouble shooter.

The research is independent of any product provider, carried out by Adviser Home on behalf of Gareth Davies of Davies Marsh, a specialist recruiter within sales & distribution.

Responses are entirely confidential to encourage the most open response from advisers.

In addition to looking at the key requirements of a BDM we also sought nominations for best providers of BDMs and for best individual BDMs from different types of provider.

Who will find the BDM Benchmark useful?

- All UK providers who employ BDMs
 - » Life Groups
 - » Asset Managers
 - » DFMs
 - » Platforms
 - » Other specialists and tool providers
- Distribution leaders and managers
- Those training BDMs
- Anyone involved in recruiting BDMs
- Those considering a BDM role
- Advisers
- Media and sector commentators
- And of course, BDMs!



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Executive Summary

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We undertake this BDM Benchmark to provide an insight on this essential subject – what do Adviser's need from BDMs and do they get it?

BDMs are the essential link between providers of all kinds and the adviser community. They have to be the 'go to' source of product and technical information and at the same time develop a close understanding of the adviser's business so they can live up to the title "business development".

Providers have to be mindful of operating costs so will never be able to offer BDMs to every adviser that might need one. So the BDM role is all about choices – deciding where to put the time and effort in. Partly as a result of this advisers are very concerned about accessibility and reliability, and about the inevitable tendency for BDMs to move on, either within their company or elsewhere

in the market. Management will take a close look at the results of this Benchmark as the relationship with a BDM can be a strong indicator of how an adviser sees a provider overall. But not all the time. We look here at the phenomenon where advisers 'don't have a BDM', or 'don't know who it is' and yet still support that provider with business.

Overall though it's clear that advisers do consider BDMs to be 'important' to their business. Moreover, they are by and large tolerant or even positive towards the move to more remote servicing. But not all advisers agree and where possible BDMs should offer more face-to-face service for the advisers who feel it's essential.

We look in the Benchmark at the top companies for BDMs and then at the top BDMs within each type of provider with finally a look at the top individual BDMs overall.

Many congratulations to all nominated BDMs.

...advisers are very concerned about accessibility and reliability, and about the inevitable tendency for BDMs to move on...

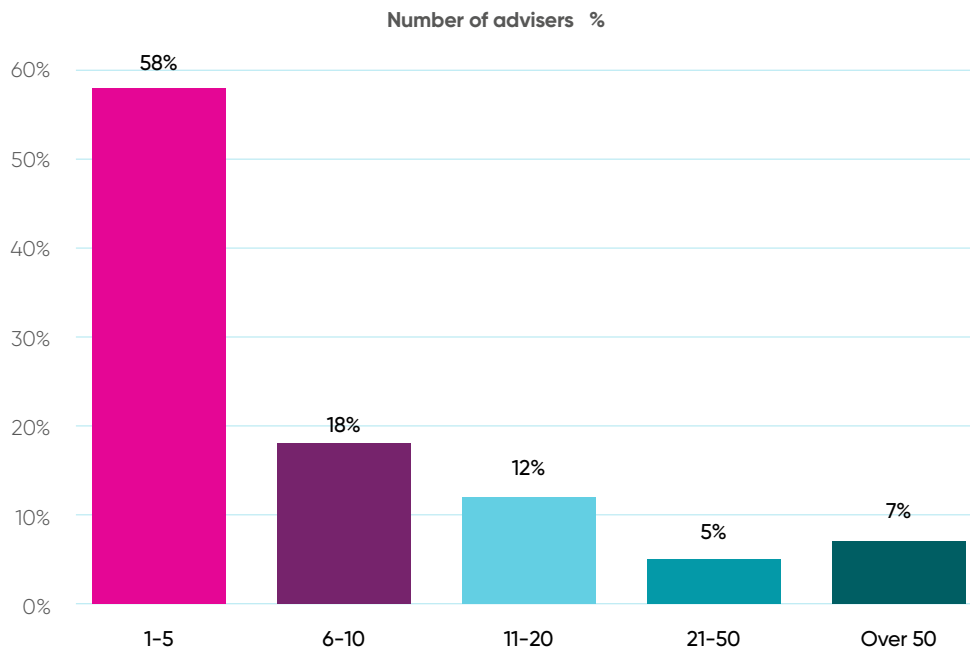


How advisers rate BDMs

How advisers rate BDMs

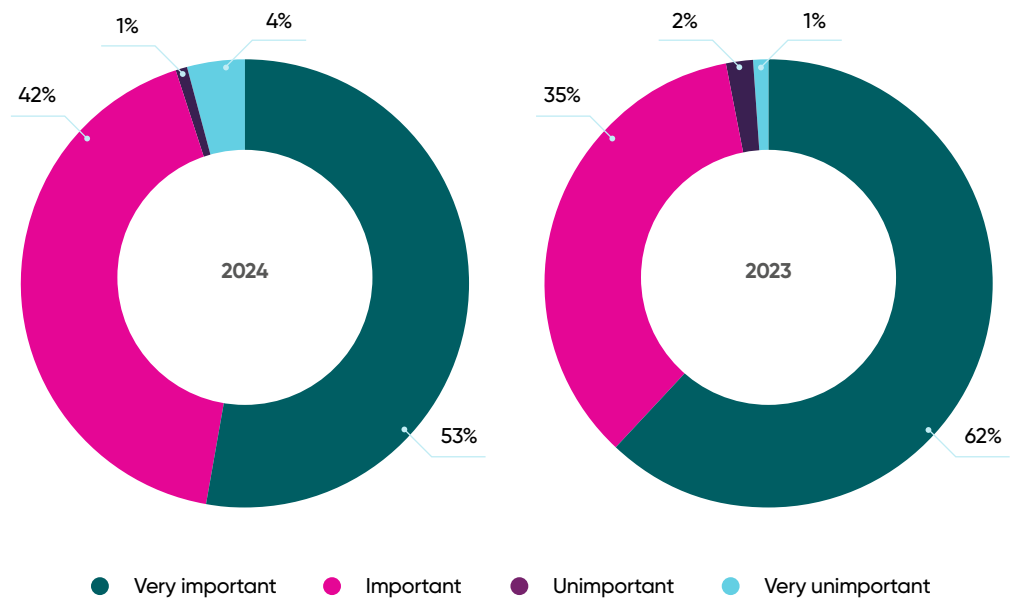
Respondents' size of firm

The range of responses is a close match to the size distribution of UK advisers so we can be confident that the Benchmark results are a fair reflection of the actual market.



How important are BDMs to an advisers business?

There's no doubt that advisers consider BDMs important to their business – with 95% agreeing, which reflects the 2023 response. There is a drop in those considering BDMs "very important" but we shouldn't read too much into this.

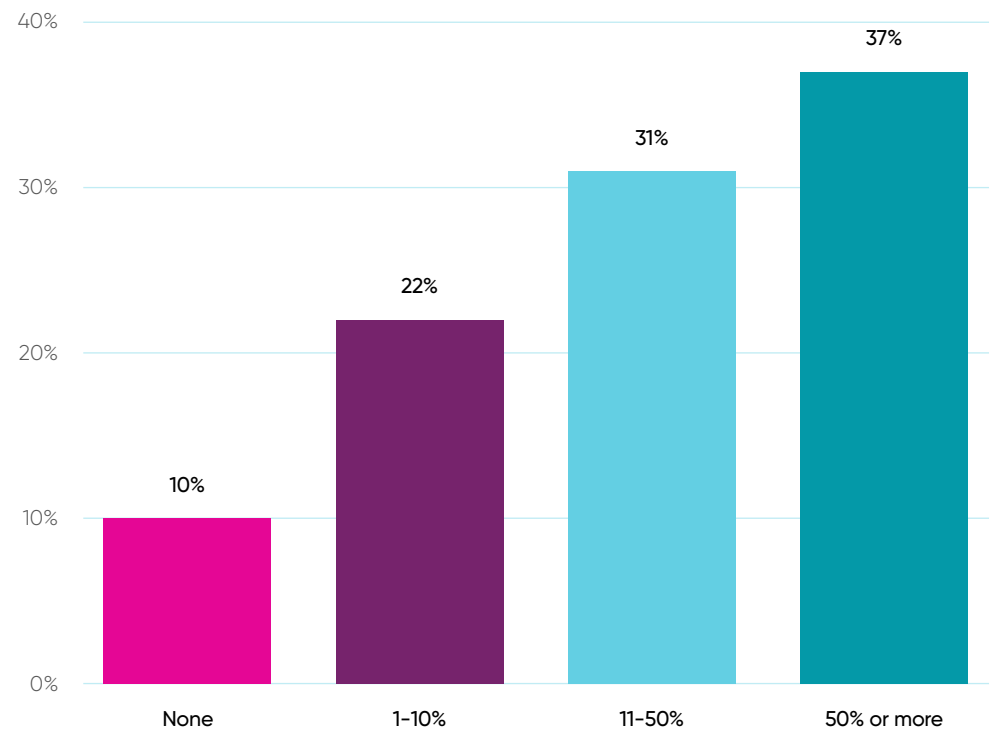


Do advisers support providers without knowing the BDM?

From a provider perspective this is a crucial question – BDMs are arguably well paid so providers need to understand the relationship between adviser support and the role of the BDM. So we asked advisers what % of providers they support without knowing the BDM – or without having a BDM assigned to them. From this question, more than a third of advisers produce business for providers without knowing the BDM in at least 50% of instances. Only 10% of advisers say they always know the BDM when they support a provider.

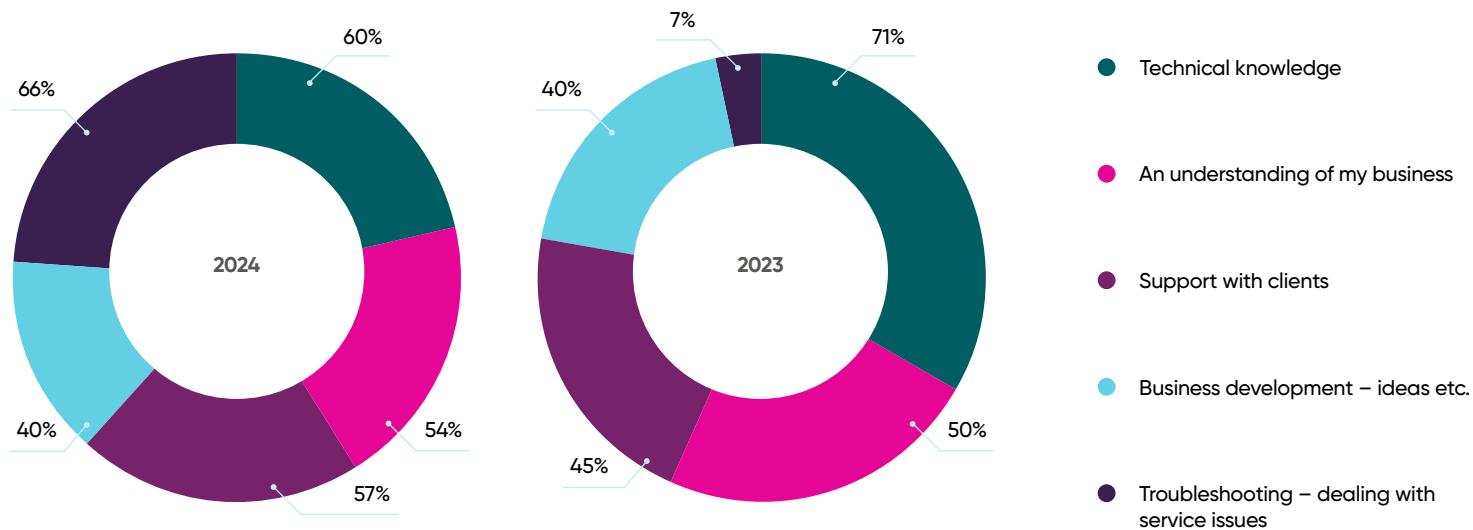
There is some conflict in these findings from the question above where 95% of advisers considered BDMs important to their business. For a BDM to be “Important” the adviser has to know them! ... and clearly they don’t always.

For what % of providers you support do you not know the BDM – or don’t have one assigned to you?



What do advisers value most from their BDMs?

Last year we had 'Technical knowledge' as the highest score and it shows well this year at 60%. But with an enormous jump – 'Troubleshooting and service issues' is now the top requirement at 66%. 'Support with clients' has also risen up the requirements table from 45% to 57%. Advisers always have issues with provider service levels but there is a clear rise in importance here which providers should take note of.



'Troubleshooting and service issues' is now the top requirement at 66%.

How do advisers rate BDMs overall for these areas?

This shows the distribution of adviser responses and then the overall average.

It's fair to say these are good results particularly for 'Technical knowledge', 'Support with clients' and 'Troubleshooting'. 'Understanding my business' and 'Business development ideas' are less positive, but not overwhelmingly so.

	Very good	Good	Neither good nor bad	Not so good	Weak	Weighted Average*
Technical knowledge	44	65	23	1	2	1.9
Understanding my business	39	57	28	9	3	2.12
Support with clients	43	70	17	4	2	1.91
Business development input – ideas etc.	28	57	44	2	4	2.24
Troubleshooting/dealing with service issues	59	53	16	4	3	1.81

*Note that lower average equates to a better result.

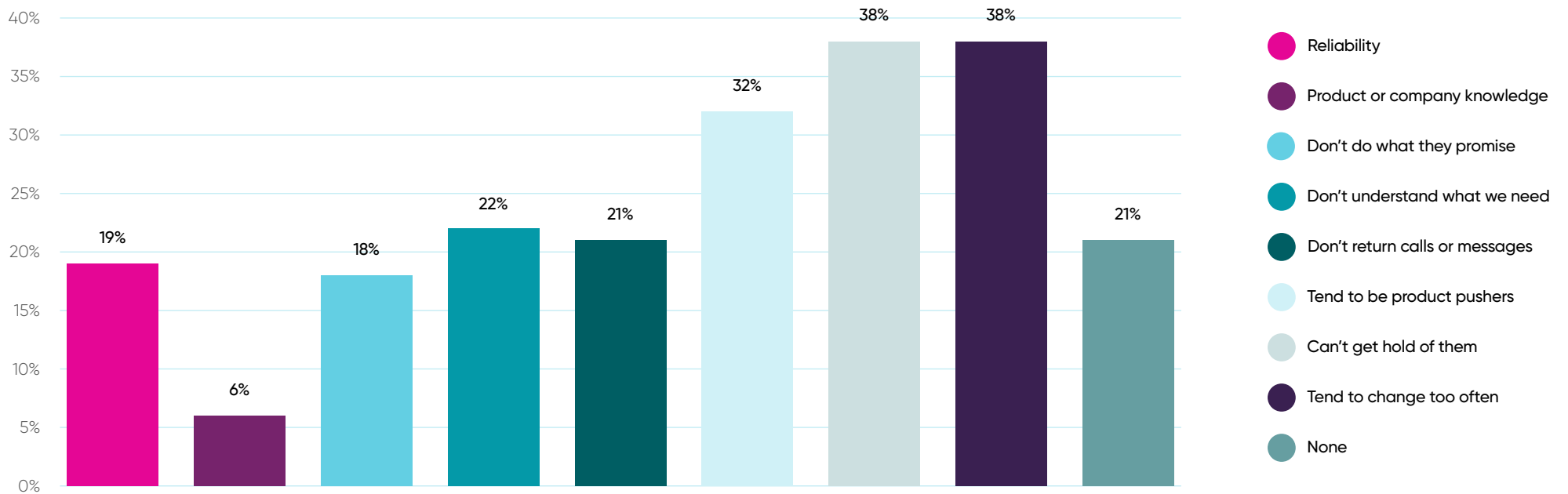
What characteristics do you look for in a BDM?

By some way 'Reliability' is the most sought after – followed by 'Strength of personal relationship' and 'Communication skills'. It's clear that most advisers consider BDMs business critical so in that light it's easy to see why reliability is non-negotiable.

	1st	2nd	3rd	4th	5th	6th	Total	Score
Reliability	78	25	18	8	4	3	136.0	5.15
Enthusiasm	6	9	32	44	28	17	136.0	3.04
Empathy	8	8	13	34	44	29	136.0	2.64
Ability to challenge me/my colleagues	4	7	13	14	26	72	136.0	2.04
Communication skills	11	52	41	15	14	3	136.0	4.16
Personal relationship	29	35	19	21	20	12	136.0	3.97

What issues do you have with BDMs?

It's good to see that only 6% have an issue with product or company knowledge. The burning issues look to be accessibility – when an adviser can't get hold of the BDM and the perennial concern about BDMs moving on, or being changed. It takes time for a BDM to be entirely trusted so frustration is understandable where the BDM leaves once they have become an asset to the adviser.



Individual adviser comments

“ I have multiple BDMs and they range from being “Awesome” to “Useless”. The awesome BDMs are quick to answer questions, know their stuff, and give hints and tips. The useless BDMs are slow to respond, need to go and check with someone else, give vague answers and shy away from discussing client’s circumstances and how their product/service can help.”

“ Going quiet when there is a problem!!”

“ Long response times (these answers do not apply to the best BDMs).”

“ No authority within their own organisation – I blame the companies for this. They need to know who’s good and who to avoid in their own organisation and forge links with their own decent management and underwriters and avoid the wasters – it’s not exactly rocket science if you want to win a brokers support.”

“ I generally find that people in these roles could not make it as an adviser but they are great at telling you how or what you should do in your job. Their main focus is pushing or achieving the sales target for the company they work for, very few of them have any real industry experience or any level of qualifications in Financial Services which is why they are hired in the first place to push the company agenda.”

“ Sometimes not clear if sales or support.”

“ One in particular doesn’t feel like he listens, treats the relationship as a tick box exercise, is patronising and dismissive.”

“ I have a good detector for inauthentic people, this is sometimes obvious, someone is really engaging, wants to be your best friend, then leaves a business, things go quiet, then they go somewhere else and they have something new to sell that contradicts their prior offering!”

What do advisers feel about the rise of remote or hybrid BDMs?

The strongest vote here is for the balanced ticket – face-to-face (F2F) for important meets and remote for everything else with 66% supporting this position. Nevertheless there are still 39% saying the move away from F2F is regrettable with 37% saying it tends to weaken relationships. The challenge for all concerned is to explore how we can reap the efficiency benefits of remote dealing whilst preserving business relationships.

	Strongly agree	Agree	Neither agree nor disagree	Disagree	Strongly disagree	Weighted Average
It's a good thing – saves time all round	19%	33%	28%	15%	4%	2.51
It's regrettable to see a decline on F2F	11%	28%	32%	20%	9%	2.88
It's entirely practical – F2F for important meets and remote for everything in between	29%	37%	17%	13%	4%	2.24
Tends to weaken the relationship with BDMs	9%	32%	26%	24%	10%	2.93

Which Life and Pensions Providers have the best BDMs?

TOP 5



Note: whilst Parmenion would not strictly be classed in this category it's perhaps significant that they received several nominations – reflecting the shifting sands in the FS sector.

Strong showing also for:

- LV
- Fidelity
- Standard Life

Which Asset Manager has the best BDMs?

TOP 5

RATHBONES

Incorporating
Investec Wealth &
Investment (UK)



Quilter

Schroders



Parmenion again shows well in a category they wouldn't claim to be in. And Timeline also have several votes. We include simply because if advisers think of them in the context of their BDMs it shows a certain impact.

A large number of companies received individual mentions:

- Artemis
- Tatton Asset Management
- Castlebay Investment Partners – impressive to receive nominations considering they don't have a dedicated BDM (that we could find)

Which Alternative investment providers have the best BDMs?

TOP 5

octopus investments

TIME
INVESTMENTS

 BLACKFINCH

Downing 

 PUMA
INVESTMENTS

Individual mentions for:

- Triple Point
- Foresight
- Mercia
- Seneca

Which Platforms have the best BDMs?

TOP 8

Parmenion

Quilter

AJBell

 **Fidelity**[™]
INTERNATIONAL

 **Fundment**

transact 

 **abrdn**

 **wealthtime**

Individual mentions for:

- Fusion
- M&G Wealth (Elevate)
- 7IM
- Nucleus
- Aegon

Which DFMs (bespoke) have the best BDMs?

TOP 5

RATHBONES

Incorporating
Investec Wealth &
Investment (UK)



**Brewin
Dolphin**

BM
BROOKS MACDONALD



vestra

QC
QUILTER CHEVIOT

Individual mentions for:

- Waverton
- EQ Investors
- Alpha Portfolio Management
- Tatton
- Evelyn Partners
- Thorntons
- Charles Stanley

Which DFMs (models) have the best BDMs?

TOP 5



Parmenion



RATHBONES

Incorporating
Investec Wealth &
Investment (UK)

QC
QUILTER CHEVIOT

Individual mentions for:

- Marlborough
- Aspen
- SEI
- Thorntons
- Wealthtime
- Fundhouse
- EBI
- Beckett Asset Management
- EQ Investors

Which Other provider type e.g., tools, tech or other specialists have the best BDMs?

TOP 4



Individual mentions for:

- Threesixty
- Dentons
- Plannr CRM
- Voyant
- Prestwood
- Portfoliometrix
- Impact Packaging
- MetLife for group risk



Individual BDMs

Individual BDMs

In this section we asked advisers to nominate up to three BDMs across a range of provider types.

Overall best BDM – from all provider types

TOP 10

- [David Beattie](#) – Parmenion
- [Karl Bearryman](#) – Parmenion
- [Will Church](#) – Timeline
- [Brian McLaughlin](#) – Rathbones
- [Kate Phillips](#) – Timeline
- [Jon Berry](#) – Canada Life
- [Ashley Brothwell](#) – Octopus
- [James Warburton](#) – Octopus
- [George Goodall](#) – Marlborough
- [Mike Potter](#) – M&G

Life and Pensions

TOP 10

- [Karl Bearryman](#) – Parmenion
- [Jon Berry](#) – Canada Life
- [David Beattie](#) – Parmenion
- [Kelly Henderson](#) – M&G
- [Gary Tulloch](#) – Scottish Widows
- [Tom Steele](#) – Royal London
- [Kenny McCall](#) – Utmost
- [Jonathan Rumball](#) – Royal London
- [Andrew Smith](#) – M&G
- [Emma Horsfall](#) – Royal London

Individuals BDMs – Asset Managers

TOP 4

- [Brian McLaughlin](#) – Rathbones
- [Elliott Poole](#) – Dimensional
- [Tim Wood](#) – Dimensional
- [James Stewart](#) – Dimensional

Best Individual BDMs – Alternative Investments

TOP 8

- [Tony Syme](#) – Downing
- [Andrew Derrington](#) – Puma
- [Ashley Brothwell](#) – Octopus
- [James Warburton](#) – Octopus
- [Nadia Halila](#) – Puma
- [Paul Askham](#) – Octopus
- [Shahan Seidi](#) – Octopus
- [Steve Godfrey](#) – Octopus

Best Individual BDM – Platforms

TOP 7

- [Karl Bearryman](#) – Parmenion
- [David Beattie](#) – Parmenion
- [Tom Ibbotson](#) – Transact
- [Andrea Villis](#) – Wealthtime Select
- [Paul Morse](#) – Transact
- [Brian Eve](#) – Transact
- [Keval Sachdev](#) – Transact

Best BDMs for DFMs (Models)

TOP 7

- [Will Church](#) – Timeline
- [Kate Phillips](#) – Timeline
- [David Beattie](#) – Parmenion
- [Brian McLaughlin](#) – Rathbones
- [Lee Crow](#) – Investec
- [Tom Ball](#) – Brooks
- [George Goodall](#) – Marlborough

Best Individual BDMs for DFMs (Bespoke)

TOP 2

- [Brian McLaughlin](#) – Rathbones
- [Will Church](#) – Timeline

What else would advisers like to see from BDMs?

By some way reliability is the most sought after – followed by strength of personal relationship and communication skills. It's clear that most advisers consider BDMs business critical so in that light it's easy to see why reliability is non-negotiable.



"Bespoke support for my business."

"Good communication, assistance with technical questions, good product knowledge, good availability."

"More powerful influencing their respective companies in product development as they are at the forefront of IFA firm feedback."

"Problem-solving and continuous improvement."

"Understanding of my business, how we work, how I work with BDMs!"

"Reliability – whether that be at the end of a phone or staying in the same role for more than 6 months!"

"Be available to secure new business client work where necessary e.g., on queries and to develop business with ideas and improved terms."

"Carry on with the support currently being given."

"Understand the specific needs of outsourced paraplanners."

"Speedy reactive support, which I thankfully get."

"More ideas and being there when there are challenges as much as they are when there are successes!"

"More technical visits to improve teams understanding of products and services and how to use relevant tools."

"When things go wrong knowing I have a contact to help rectify is so important."

"Being available to help."

"Understanding that how it's always been done doesn't mean it always has to be done that way. How new ideas are

being adopted and providing ideas relevant to my specialist area."

"Think outside the box."

"Helpful approach, good technical knowledge."

"A real understanding of what challenges we face with clients rather than relying on what they perceive to be the issues that we face and therefore solving problems that don't exist."

"Support with biz development. Impartial, unbiased help and support."

"Ideas for promoting financial planning to clients."

"Proactive approach."

"More understanding of business and pro-active approach."

"Regular check-in emails."

"Put feelers out for recruitment."

"Help when there is an issue."

"Regular contact to touch base. Proactive rather than reactive."

"Just being able to troubleshoot problems quickly and efficiently."

"Keep up the support."

"Proactivity – responsiveness."

"ALL GOOD."

"Continued presence where needed – being there when we need them is key."

"Understand the business better."

"More group sessions and working closely with management."

"Input regarding the future of their business."

"Taking accountability of service issues when they occur."

"Speedy response and solutions."

"Ongoing advice and support."

"Being kept up-to-date."

"In depth product knowledge linked to technical problems."

"Tech solutions that join up."

"Availability."

"Regular contact & updates for clients."

"Continue quick response to queries (within 24 hours)."

"Supporting our growth."

"Customer service support when required – not a few days later."

"More F2F events."

"Ideas for business development."

"Continual technical assistance."

"More understanding of my business."

"Reliability, present at all times, not just chasing the AUM."

"Better technical knowledge than me on every single aspect of running a directly authorised firm, CIP etc., which I know is not a reasonable thing to expect!"

"More help with processing applications."

"Happy with the support we receive."

"Take the company hat off."

"I would like more providers to have a BDM."

"Improve availability."

"Nothing, as the best I have ever worked with."

"Communicate with us."

"Get back to me same day & take ownership of my problems to conclusion."

"Don't ring me all the time."

"Regular F2F and contact."

"Technical knowledge & expertise on working through complicated cases is always appreciated."

"Feeding back issues to their upper management so they don't happen again."

"Support to help add value to clients."

"Reliability and communication to resolve issues quickly and efficiently."





Individual mentions across provider categories

Individual mentions across provider categories

All BDMs who received an individual mention in all provider categories:

- [Adrian Denton](#) – Aegon
- [Adrian Newby](#) – Scottish Widows
- [Alan Cameron](#) – Canada Life
- [Alan Thomas](#) – Vitality
- [Alfie Hayes](#) – Rathbones (Incorporating Investec)
- [Alice Gerry](#) – LGT
- [Alison Mollard](#) – AJ Bell
- [Alistair Stewart](#) – abrdn
- [Andrew Davies](#) – Brooks
- [Andrew Harvey](#) – Fundment
- [Andrew McReady](#) – Royal London
- [Andrew Smith](#) – M&G
- [Andrew Vaughn Payne](#) – Waverton
- [Andy Austin](#) – Rathbones (Incorporating Investec)
- [Andy Darrington](#) – Scottish Widows
- [Andy Howe](#) – Downing
- [Andy Matthews](#) – Brewin Dolphin
- [Andy Tooker](#) – LGT Vestra
- [Andy Walker](#) – Dimensional
- [Antony Teare](#) – LGIM
- [Antony Webb](#) – Quilter
- [Ashley Mason](#) – Royal London
- [Ashley Thornton](#) – Aviva
- [Ben Burton](#) – Vanguard
- [Ben Peele](#) – Portfolio Metrix
- [Billy Bell](#) – Quilter
- [Brendan Bassage](#) – Fidelity
- [Carl Barron](#) – XPS Pensions
- [Catherine Rynne](#) – Novia Global
- [Chris Coombs](#) – Parmenion
- [Chris Hillebrandt](#) – Royal London
- [Chris Mills](#) – M&G
- [Chris Murphy](#) – Scottish widows
- [Chris Myerscough](#) – Scottish Widows
- [Christopher Cade](#) – Sarasin
- [Claire Griffiths](#) – Royal London
- [Claudia Clark](#) – PortfolioMetrix
- [Colin Thompson](#) – M&G
- [Craig Baker](#) – Dentons
- [Dan Cowell](#) – Canada Life
- [Dan Smith](#) – Curtis Banks
- [Daniel Kelly](#) – Royal London
- [Daniel Schieber](#) – Quilter Cheviot
- [Daniel Smith](#) – Curtis Banks

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- [Darren McGowan](#) – Royal London
 - [David Beattie](#) – Parmenion
 - [David Mackrory](#) – Aviva
 - [David MacNeil](#) – Castlebay
 - [David Scholes](#) – Cashcalc
 - [Debbie Holmes](#) – EBI
 - [Ed Green](#) – M&G
 - [Edward Finney](#) – Octopus Investments
 - [Elliot Kibble](#) – Pacific
 - [Emily Armstrong](#) – Puma
 - [Emma Horsfall](#) – Royal London
 - [Gareth Davies](#) – Quilter
 - [Gary Tulloch](#) – Scottish Widows
 - [Gemma Savage](#) – Aviva
 - [Glen Stewart](#) – Committed Capital
 - [Graeme Forster](#) – Brewins
 - [Graham Miller](#) – Transact
 - [Greg Morton](#) – AJ Bell
 - [Hannah Clarke](#) – abrdn
 - [Helen Jackson](#) – abrdn
 - [Ian Copcoat](#) – Waverton
 - [Jack Corcoran](#) – AJ Bell
 - [James Wallace](#) – Rathbones (Incorporating Investec)
 - [James Warburton](#) – Octopus Investments
 - [Jenny Foster](#) – Rathbones (Incorporating Investec)
 - [John Carter](#) – Schroders
 - [John Finch](#) – Canada Life
 - [Jon Ball](#) – Avivas
 - [Jon McArdle](#) – Quilter
 - [Joshua Day](#) – Foresight
 - [Julie Robinson](#) – abrdn
 - [Justin Woolf](#) – Brooks Macdonald
 - [Karl Bearryman](#) – Parmenion
 - [Kate Elwell](#) – Genovo
 - [Kate Philips](#) – Timeline
 - [Keith Arnold](#) – Charles Stanley
 - [Keith Dunbar](#) – M&G
 - [Keith Duncan](#) – Royal London
 - [Kenny Boyd](#) – AJ bell
 - [Kenny McCall](#) – Utmost
 - [Kieran Grattan](#) – Royal London
 - [Kieron McLoughlin](#) – Liontrust
 - [Kurt Davidson](#) – Close Brothers Asset Management
 - [Larrisa Burgsdorf](#) – abrdn
 - [Larry Brennan](#) – Tellworth
 - [Lauren Daly](#) – Royal London
 - [Liam Pryce-Jones](#) – Brooks Macdonald
 - [Lisa Marie Finch](#) – Evelyn Partners
 - [Liz Greene](#) – Time
 - [Louise Comber](#) – Brooks MacDonald
 - [Lucy Mitchell](#) – Evelyn partners
 - [Luke Morris](#) – Royal London
 - [Manie Hanna](#) – Transact
 - [Manjit Singh](#) – Aviva
 - [Marie Jeanette Lawrence](#) – M&G
 - [Marius Hutcheson](#) – Quilter Cheviot
 - [Mark Bannister](#) – Fidelity

-
- [Mark Johnson](#) – Evelyn Partners
 - [Mark McCormack](#) – Royal London
 - [Mark Randell](#) – InvestAcc Pension
 - [Mark Titcombe](#) – LV
 - [Martin Hume](#) – Quilter
 - [Martin Perrett](#) – Puma Investments
 - [Matt Hardy](#) – EQ Investors
 - [Michael Campion](#) – Fidelity
 - [Michelle Ringer](#) – Royal London
 - [Mike Ferguson](#) – BNY Melon
 - [Mike Potter](#) – M&G
 - [Murray Clark](#) – Quilter Cheviot
 - [Nadia Halila](#) – Puma Investments
 - [Nick Bird](#) – Triple Point
 - [Nick Heath](#) – YOU AM
 - [Nick Sheppard](#) – Thorntons
 - [Paul Askham](#) – Octopus Investments
 - [Paul Marks](#) – Fidelity
 - [Paul Morse](#) – Transact
 - [Paul Reed](#) – M&G
 - [Peter Long](#) – LGT
 - [Peter Steele](#) – Seneca
 - [Peter Thompson](#) – King & Shaxson
 - [Ross Slater](#) – Brewin Dolphin
 - [Russell Fryer](#) – Mercia
 - [Ryan Meredith](#) – AJ Bell
 - [Ryan Seaton](#) – Tatton
 - [Sam Ardis](#) – Parmenion
 - [Sam Cole](#) – 7IM
 - [Sam Durnell](#) – Brooks MacDonald
 - [Sam Sugarman](#) – abrdn
 - [Sarah Wakefield](#) – Seneca
 - [Scott McMeekin](#) – Royal London
 - [Simon Church](#) – 7IM
 - [Simon Nunn](#) – Aviva
 - [Simon Swaffer](#) – Royal London
 - [Simon Tutton](#) – Deepbridge
 - [Simon Whitby](#) – Vitality
 - [Sophie Lloyd](#) – Time Investments
 - [Stephen Tibbs](#) – Nucleus
 - [Steve Darby](#) – Royal London
 - [Thomas Jaffrey](#) – Blackfinch
 - [Tim Field](#) – Timeline
 - [Tim Wood](#) – Dimensional Fund Advisors
 - [Toby Jamieson-Till](#) – 7IM
 - [Todd Jeffries](#) – Parmenion
 - [Tom Ball](#) – Brooks MacDonald
 - [Tom Goldie](#) – Aldermore
 - [Tom Gray](#) – Transact
 - [Tom Northover](#) – M&G
 - [Tom Rich](#) – Rathbones (Incorporating Investec)
 - [Tony Hollingbury](#) – LGT
 - [Tony Sime](#) – Downing
 - [Vince Fitzpatrick](#) – Fidelity
 - [Vince Meredith](#) – Foresight
 - [Will Atwill](#) – Downing
 - [Will Church](#) – Timeline
 - [Zoe Giles](#) – Quilter



Acknowledgements

Acknowledgements



Gareth Davies

Gareth has over 20 years recruitment experience in placing BDMs with various providers in the sales & distribution sector. He's the founding director of Davies Marsh Ltd – a specialist search and selection recruitment consultancy and was previously one of the founding Directors of BWD.



Brendan Llewellyn

Brendan has over 30 years' financial service experience working with over 40 providers on distribution and strategy. Brendan analysed the data from the respondents and constructed the report on behalf of Davies Marsh Ltd.

“ Gareth has been an excellent support in my recent career change. I have always found him to be trustworthy, professional and importantly, he gets to know the people he works with and really cares about finding the right opportunities. ”

Francis Walker – BDD – Canaccord Genuity - Nov 2023



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