



**UK WEALTH MANAGEMENT**  
**INDUSTRY REPORT 2016**

***FURTHER GROWTH IN A CHALLENGING  
ENVIRONMENT BUT UNPRECEDENTED  
UNCERTAINTY AHEAD***

In association with  
Research Partner



**EY**

Building a better  
working world

## About us

ComPeer provides competitor benchmarking, industry insights and bespoke research services for the Wealth Management sector. A full list of our services can be found at the back of this report.

This report is based on ComPeer's research database collected by questionnaires from Private Banks, Private Client Investment Managers, Full Service Wealth Managers and Execution Only Stockbrokers. This is supplemented by trade data from the London Stock Exchange, together with independent research of proprietary and public domain sources. The report has been produced for over twenty years and tracks the key trends in the sector. This research tracks 161 firms of which approximately half completed questionnaires and the remainder contributed partial data.

The detailed data and benchmarking services are confidential to the individual participants. This report presents data and findings from a market-wide perspective and offers observations on the outlook for the industry. All analysis of data together with any opinions and projections remain the work and property of ComPeer.

The report offers a unique insight into an industry that provides both huge opportunities and significant challenges. We would like to thank all participants who have contributed to the survey and would be pleased to discuss any aspects of particular interest. We have a strong history of bespoke research having recently completed papers on peer-to-peer lending, client reporting solutions as well as multiple research projects into the attitudes and behaviours of high net worth investors.

## Our Research Partner

EY's Wealth and Asset Management advisory division attracts more organisations each year because of its extensive hands-on experience and technical knowledge.

EY's dedicated practice helps clients prepare for growth, manage risk, enhance operational effectiveness and efficiency, maintain adequate controls, navigate regulatory compliance and leverage technology.

As an integrated part of EY's Global Financial Services Group, this practice can also draw upon the skills of their Tax Advisory Services and Transaction Advisory Services practices to further help clients meet the unique competitive and regulatory challenges, no matter how complex.

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- Global treasury
- FATCA advisory
- Fraud investigation and dispute

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