



**UK WEALTH MANAGEMENT**  
**INDUSTRY REPORT 2017**

***RESILIENCE IN THE FACE OF ADVERSITY***

In association with  
Research Partner



## About us

Formed in 1993, Compeer is recognised as the premier provider of Business Performance Benchmarking for the Wealth Management and Private Banking industry. These reports have contributed to the firms' strategic thinking and planning.

Compeer also undertakes three primary types of research, both as bespoke projects for clients and for the industry as a whole: intra-industry research with C-level executives from the firms, online research with affluent and high net worth investors and online research with the advisory community.

This unrivalled experience has given Compeer a unique insight into the key issues driving business performance in the wealth management industry. It also enhances its ability to provide a unique view of a client's competitive position and the level of success of their business strategies.

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.

## Our Research Partner

IRESS design, develop and implement unified software solutions for the financial services industry. Whether you're trading on global financial markets, managing investments or helping your clients plan their financial future; you can rely on their software, and their team, to deliver real outcomes for your business and your clients.

Their complete end-to-end solutions enable you to engage and service your clients across all channels, achieve operational efficiencies, make considered decisions, in addition to monitoring and managing risk. What's more, they don't believe in a one-size-fits-all approach. Their solutions flex to your business and commercial objectives – from standardised out-of-the-box implementations to fully tailored solutions.

Their proven technology, expertise and implementation track record means that businesses of all sizes chose to partner with them – from the world's most iconic financial services brands to small business entrepreneurs. Above all else, they have an unwavering focus on what's most important: deliver outcomes today, develop for tomorrow and design for the future.

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<b>Section 1: Introduction .....</b>	<b>3</b>
<b>Section 2: Executive Summary.....</b>	<b>4</b>
<b>Section 3: Constituency.....</b>	<b>7</b>
3.1 Criteria for inclusion in Compeer’s survey .....	7
3.2 Number of firms.....	7
3.3 Spread in size of firms .....	9
3.4 Office locations.....	9
<b>Section 4: Revenue.....</b>	<b>11</b>
4.1 Trends by firm type.....	11
4.2 Key areas of revenue growth .....	12
4.3 Revenue return on managed assets for the Wealth Managers.....	15
4.4 The dominance of the top five firms in each type .....	16
4.5 Treasury income: A key source of revenue .....	17
<b>Section 5: Costs .....</b>	<b>19</b>
5.1 Trends by Firm Type.....	19
5.2 Departmental Cost Analysis.....	20
5.3 Staff Costs .....	22
5.4 Non Staff Costs.....	24
<b>Section 6: Staff .....</b>	<b>26</b>
6.1 Total staff .....	26
6.2 Staff numbers by department .....	27
6.3 Breakdown of whole market staff numbers and average staff cost .....	29
6.4 Asset capacity of FOPs .....	30
<b>Section 7: Accounts .....</b>	<b>32</b>
7.1 Account numbers.....	32
7.2 Account size .....	33
7.3 New accounts opened with Execution Only Stockbrokers .....	35
7.4 Investigating the existence of economies of scale .....	37
7.6 The popularity of discretionary services by Wealth Managers .....	39

<b>Section 8: Assets .....</b>	<b>40</b>
8.1 Historical trends in investment assets .....	40
8.2 Assets by mandate type for Wealth Managers .....	43
8.3 Managed assets by instrument type .....	44
8.4 Investment assets by ownership .....	45
8.5 New business .....	47
8.6 Assets by account size band (nominee only) .....	47
<b>Section 9: Trades .....</b>	<b>49</b>
9.1 Trades transacted by Stockbrokers .....	49
9.2 A closer look at Execution Only Stockbrokers .....	51
9.2.1 Historical trends in Execution Only trade volumes .....	51
9.2.2 Commissions versus costs .....	52
9.3 UK retail markets .....	53
9.3.1 Retail volumes .....	53
9.3.2 Retail bargain value (£m) .....	54
9.3.3 Purchase content by investment type .....	55
9.4 Trade Analysis .....	56
9.5 Retail bonds .....	57
<b>Section 10: Pre-tax Profits and Scalability .....</b>	<b>58</b>
<b>Appendix A: List of Firms .....</b>	<b>60</b>