

# AWARD-WINNING WEALTH MANAGEMENT



ST. JAMES'S PLACE  
WEALTH MANAGEMENT

## Britain's Most Admired Companies – Top in Sector 2015/16

- These awards were determined through research conducted by Management Today, in conjunction with Leeds Business School.
- This research asked Britain's largest public companies to evaluate their peers on a range of criteria including the quality of services, management, financial soundness and innovation.



## City of London Wealth Management Company of the Year 2015

- Investors were asked to cast their votes based on their personal experiences, particularly the quality of advice and service they have received.
- Over 25,000 votes were received from the public across all award categories.
- St. James's Place was also shortlisted in four other categories, including Best ISA Provider and Best Advisory Service.



## The Personal Finance Awards 2015/16 – Best Financial Adviser

- Readers of The Money Pages were asked to vote for the organisation that offers clear advice and high standards of customer service.
- St. James's Place has been the proud recipient of this award for the past six years.



## Wealth Adviser Awards 2015 – Best Private Client Investment Manager

- Identifying excellence among financial services organisations, readers of Wealth Adviser magazine voted St. James's Place winner of the Best Private Client Investment Manager award.
- This award recognises the quality of advice and service given to clients; St. James's Place has now won this award category for the third successive year.



## Investors Chronicle & FT Investment and Wealth Management Awards 2015 – 'Best Wealth Manager for Trusts' and 'Best Wealth Manager for Inheritance Tax and Succession Planning'

- The methodology behind the awards combines reader votes with the verdict of a panel of judges.
- Readers were asked to score the wealth managers they use on their competence, trustworthiness, value for money and expertise.
- St. James's Place was also short-listed in three other award categories.



“These awards recognise the importance we place on client relationships and our approach to the management of their wealth – which lies at the heart of our business. We would like to thank everyone who has voted for us.”

David Bellamy, Chief Executive,  
St. James's Place Wealth Management

### 2015

FT/Investors Chronicle Best Wealth Manager for Trusts  
FT/Investors Chronicle Best Wealth Manager for  
Inheritance Tax and Succession Planning  
Britain's Most Admired Companies Awards (Top in Sector)  
The Personal Finance Awards – Best Financial Adviser  
Wealth Adviser Awards – Best Private Client Investment Manager  
City of London Wealth Management Awards –  
Wealth Management Company of the Year  
FDs' Excellence Awards – Pension Firm of the Year

### 2014

FT/Investors Chronicle Best Wealth Manager for  
Tax Efficiency and Advice  
The Personal Finance Awards – Best Financial Adviser  
Wealth Adviser Awards – Best Private Client Investment Manager  
City of London Wealth Management Awards –  
Best Performing Fund  
Money Observer Pension Awards – Best Pension  
Providers' Fund, UK Equities  
National Business Awards – FTSE 100 Business of the Year Finalist  
Online Personal Wealth Awards – Best Wealth Manager  
Morningstar UK Fund Awards – Best Global Equity Fund

### 2013

Britain's Most Admired Companies Awards (Top in Sector)  
Shares Awards – Best Wealth Manager  
Wealth Adviser – Best Private Client Asset Manager UK  
City of London Wealth Management Company of the Year  
FT/Investors Chronicle Best Wealth Manager for  
Tax Efficient Investments  
The Personal Finance Awards – Best Financial Adviser

### 2012

Britain's Most Admired Companies Awards (Top in Sector)  
FT/Investors Chronicle Wealth Manager of the Year  
City of London Wealth Management Company of the Year  
UK Stock Market Awards Winner  
The Personal Finance Awards –  
Best Financial Adviser

### 2011

FT/Investors Chronicle Best Wealth Manager for Tax  
The Personal Finance Awards – Best Financial Adviser

### 2010

Daily Telegraph Wealth Manager of the Year  
The Personal Finance Awards – Best Financial Adviser

### 2009

FT/Investors Chronicle Best Wealth Manager for  
Inheritance Tax & Succession Planning  
FT/Investors Chronicle Wealth Manager of the Year  
FT/Investors Chronicle Best Wealth Manager for Investments  
Daily Telegraph Best Performing Fund