

2017 WEALTH MANAGER OF THE YEAR ANNOUNCED AT GROWTH INVESTOR AWARDS



Last night, at the Royal Lancaster in London, more than 450 decision makers from the UK's vibrant SME investment ecosystem celebrated their stellar successes at the third annual Growth Investor Awards, organised by Intelligent Partnership.

Competing for the highly coveted Wealth Manager of the Year award, UBS took the top accolade for its commitment to advising clients on appropriate risk exposures, goals-based assessment of investor appetite, and a strong manager due diligence culture. Coming a close second, runner up Canaccord Genuity Wealth Management was chosen for its useful service selling VCT interests, its in-house AIM portfolio almost doubling in assets under management and its use of third-party research organisations. The judges identified Westminster Wealth Management as 'One to Watch' for its impressive growth, good use of AI products along with strong due diligence processes and tax efficiency assessment.

The Wealth Manager of the Year category, sponsored by RAM Capital Partners, recognises wealth management companies that actively promote alternative investments. Judges considered the finalists' market knowledge, application of expertise, approach to compliance and regulation, management of risk and overall promotion of alternative investments. In previous years, both UBS and Barclays have scooped the accolade.

Lenny Norstrand, Partner at RAM Capital Partners, presented the award to UBS. The strong field included Canaccord Genuity Wealth Management, Westminster Wealth Management, Amicus Wealth, Cazenove Capital and Johnston Campbell. This is the third year in a row that RAM Capital Partners has sponsored the award, highlighting its commitment to diversity and innovation in the tax-efficient investment sector.

Norstrand said: "RAM works closely with the wealth management industry to promote products that achieve mitigation of income tax, capital gains tax and inheritance tax. We only market investments provided by external fund managers whose products, comprising BPR, EIS, SEIS and VCTs, we believe should diversify and could add significant value to investors' portfolios"

- Winner: UBS
- Runner-up: Canaccord Genuity Wealth Management
- 'One to Watch': Westminster Wealth Management