



**Press Announcement for Immediate Release**  
**London Friday 15<sup>th</sup> March 2019**

**St James's Place WM of the Year 5 Times in Succession**  
***Andy Bell Receives Lifetime Achievement Award***

At the annual City of London Wealth Management Awards held at the Guildhall, Steve Polese, Vice-President at Clearstream, presented St James's Place with the *Wealth Manager of the Year Award*. Angela Knight CBE, adviser to Goodacre UK, the company responsible for the Awards said:

*"This is a quite remarkable achievement. The online public poll attracted over 30,000 votes and for St James's Place to win this Award 5 times in a row is a very significant achievement."*

Andy Bell was presented with the Lifetime Achievement Award following the successful flotation of AJ Bell. Andy Bell said:

*"We launched the first online SIPP for the direct consumer market in the Year 2000 and very quickly moved into the UK platform space. New technology opens up places that firms like us can go; to ignore innovation we lose and to embrace it gives us a greater chance of winning. Thanks to Goodacre and everyone involved in COLWMA for this fantastic Award and I would like to congratulate all other companies who have received awards."*

AJ Bell YouInvest also won the Award for *Best SIPP Provider*.

David Miller was presented with the Award for Industry Author and said:

*"I am so grateful to Quilter Cheviot for supporting me in the publication of my book *Diary of a Fund Manager* and to my contacts, in particular Debbie Hewitt MBE, Chair of Visa Europe, who continually contribute to my thinking as I pen the *Diary* each week. To receive this Award is an honour and I am absolutely delighted"*.

Individual winners included Alistair Osborne, Chief Business Commentator at The Times, who was presented with the Award for Financial Journalist of the Year for a range of excellent articles on listed companies and regulated investment firms.

Steven Sussman was named CEO of the Year following his 21 years at JM Finn.

Clive Worlock from Charles Stanley was presented with the BITARisk Award: Wealth Manager of the Year (male) for his well acknowledged performance and Lucy Coutts from JM Finn won the female version for consistently impressive returns.

Michael Waddington from Tilney won the Mudlark Award for Exceptional Performance in the Back Office having been in the business for some 38 years and fully committed to operational requirements.

## Notes for Editors

The City of London Wealth Management Awards (COLWMA) recognise, promote and celebrate quality of service from Wealth Management companies and individuals. Winners of the company awards are determined by an online, public vote which takes place over a two-week period which also includes nominations for individual winners.

COLWMA is supported by the London Stock Exchange and were sponsored by leading service and system suppliers to the regulated financial services sector, namely; Allfunds Bank, AutoRek, BITA Risk, Clearstream, FACET Online, Hilbert Investment Solutions, IMVS, JHC, Pershing, Platform Securities, and XM.

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# City of London Wealth Management Award Winners 2019

## Company Awards

Best Advisory Service	Redmayne Bentley
Best CFD Provider	Accendo Markets
Charity Investment Team of the Year	Investec Wealth & Investment
Best Corporate Banking Services to Wealth Managers	NatWest
Family Office of the Year	Hottinger Group
Best Fund	Rathbones
Best Fund Platform	Praemium
Best FX Service Provider	XM
Goal Based Investing	Moola
Best Junior ISA Provider	Killik & Co
Best ISA Provider	Interactive Investor
Best Market Newsletter	Alpha Portfolio Management
Online/Mobile Access	Dabbl
Best Private bank	Nedbank Private Wealth
Best SIPP Provider	AJ Bell YouInvest
Spread Betting Provider	InterTrader
Structured Product Provider	Hilbert Investment Solutions
Regional Wealth Manager of the Year: Southern England	Partridge Muir & Warren
Regional Wealth Manager of the Year: Wales and Western England	Hargreaves Lansdown
Regional Wealth Manager of the Year: Northern England	Ramsey Crookall
Regional Wealth Manager of the Year: Central and Eastern England	AFH Wealth Management
Regional Wealth Manager of the Year: Scotland & Northern Ireland	Speirs & Jeffrey
The London Stock Exchange Award for Execution-Only Stockbroking	Halifax Share Dealing
The IMVS Award for Discretionary Wealth Management	TAM Asset Management

The Pershing Award for  
Innovation in Wealth Management

OCTO Members Group

The JHC Award for  
Outstanding Achievement of the Year

Arbuthnot Latham

The Clearstream Banking Award for  
Wealth Management Company of the Year

St. James's Place Wealth Management  
Group

### **Individual Awards**

Most Promising Newcomer	Nathan McLean	Seven Investment Management
BITA Risk Wealth Manager of the Year (Female)	Lucy Coutts	JM Finn
BITA Risk Wealth Manager of the Year (Male)	Clive Worlock	Charles Stanley
Outstanding Achievement	Stacey Parsons	Winterflood Securities
London Stock Exchange Award for Educational Initiative	Emily Woolard	Hottinger Group
Outstanding Contribution to Estate Planning	Ian Dyall	Tilney
Excellence in Business Development	Mélanie Damani	Hottinger Group
Initiatives in Diversity	Tracey Davidson	Heartwood Investment & Handelsbanken Wealth Management
Portfolio Manager of the Year	James Menzies	Greystone
CEO of the Year	Steven Sussman	JM Finn
The FACET Award for Best Industry Commentator	Steph McGovern	BBC
Industry Author	David Miller	Quilter Cheviot
Financial Journalist of the Year	Alistair Osborne	The Times
Mudlark Award for Exceptional Performance in the Back Office	Michael Waddington	Tilney Group
The JHC Award for Lifetime Achievement of the Year	Andy Bell	AJ Bell