

# CRAIN'S LIST Wealth Managers & Stockbrokers

Ranked by total assets managed, UK

2008 Ranking	Company	Contact details	Senior local person	Services	Yr est locally Location head office	Assets managed locally % discretionary % advisory	Assets managed UK % discretionary % advisory	Local Employees Fee earners	Minimum amount Collective account Individual account
1	<b>Barclays Wealth Private Banking</b>	1 St James's Square, Manchester M2 6DN Tel: 0161 834 2040 www.barclayswealth.com	James Bailey Alan Edwards, Directors	Global private banking and wealth management	N/A London	N/A N/A N/A	£50,700,000,000 N/A N/A	33 13	N/A N/A
2	<b>Brewin Dolphin</b>	National House, 36 St Ann St, Manchester M2 7LE Tel: 0161 839 4222 brewin.co.uk	Robert Race, Divisional Director	Stockbrokers and portfolio managers	1840 London	£1,000,000,000 50% 50%	£22,000,000,000 70% 30%	28 6	N/A N/A
3	<b>Rensburg Sheppards Investment Management Ltd</b>	7 Ralli Courts, West Riverside, Manchester M3 5FT Tel: 0161 832 6868 www.rensburgsheppards.co.uk	John Simpson, Senior Investment Director Jonathan Quick, Director	Investment led wealth management	1993 Leeds	N/A 72% 28%	£10,900,000,000 71% 29%	15 9	£100,000 £100,000
4	<b>Kleinwort Benson</b>	Peter House, Manchester M1 5AN Tel: 0161 200 1630 www.kleinwortbenson.com	Colin Rowe, Head of Private Wealth Management Regions	Offer expertise to private and corporate clients through private wealth management and corporate fiduciary and intermediaries' businesses	2006 London	N/A 85% 15%	£6,040,000,000 N/A N/A	2 1	£1,000,000 £1,000,000
5	<b>Quilter</b>	4th Floor, The Pinnacle, 73 King St, Manchester M2 4NG Tel: 0161 832 9979 www.quilter.co.uk	David Rothburn, Executive Director	Specialist in bespoke investment management services	1993 London	N/A N/A N/A	£5,900,000,000 N/A N/A	12 7	£25,000 £200,000
6	<b>Close Asset Management Ltd</b>	82 King St, 3rd Floor, Manchester M2 4WQ Tel: 0161 935 8053 www.closeam.com	Paul Clements, Director	Beskoke investment arm of Close Brothers Group plc	1990 London	£400,000,000 100% 0%	£3,200,000,000 100% 0%	6 4	£250,000 £500,000
7	<b>SG Hambros Bank Limited</b>	10th floor, 3 Hardman Street, Spinningfields, Manchester M3 3HF Tel: 0161 932 1522 www.sghambros.com	Anne Taylor, Head of Manchester office and Senior Private Banker	Award-winning private bank which provides banking, investment, financial planning and fiduciary services	2009 London	N/A 50% 50%	£2,927,009,000 N/A N/A	3 2	£1,000,000 £1,000,000
8	<b>Brown Shipley</b>	1 King Street, Manchester M2 6AW Tel: 0161 214 6500 www.brownshipley.com	Ian Sackfield, Managing Director	Private banker and wealth manager	1900 London	£1,000,000,000 N/A N/A	£2,000,000,000 70% 30%	110 30	£150,000 £250,000
9	<b>Adam &amp; Company Plc</b>	Old Bank House, 25 Ann Street, Manchester M2 7LG Tel: 0161 455 1580 www.adambank.com	David Taylor, Director	Personally delivered wealth management including private banking and investment management	1995 Edinburgh	£150,000,000 N/A N/A	£1,500,000,000 100% 0%	21 5	£250,000 £500,000
10	<b>WH Ireland Group Plc</b>	11 St James's Square, Manchester M2 6WH Tel: 0161 832 2174 www.wh-ireland.co.uk	Richard Ford, Chief Executive John Scott, Head of Private Clients	Stockbroker, wealth manager, financial adviser, AIM adviser and Nomad	1908 Manchester	£350,000,000 40% 60%	£900,000,000 40% 60%	108 8	N/A N/A
11	<b>Dewhurst Tovevell &amp; Co Ltd</b>	5 Oxford Court, Manchester M2 3WQ Tel: 0161 281 6400 www.dewhurst-tovevell.co.uk	Alan Tovevell, Chairman Phillip Dewhurst, Managing Director	Independent wealth managers providing focused, specialist quality advice	1997 Manchester	£750,000,000 N/A N/A	£750,000,000 0% 100%	24 9	£200,000 £200,000
12	<b>Pilling &amp; Co</b>	Henry Pilling House, 29 Booth St, Manchester M2 4AF Tel: 0161 832 6581 www.pilling.co.uk	David Bradley, General manager	Traditional full service stockbrokers and investment managers	1893 Manchester	£500,000,000 N/A N/A	£500,000,000 N/A N/A	34 6	£1,000 £1,000
13	<b>Xentum Ltd</b>	Summit House, 35 Church Road, Lymm WA13 0QS Tel: 0845 226 6971 www.xentum.co.uk	Dominic Baldwin, Managing Director	Independent chartered financial planning team	2004 Lymm	£140,000,000 100% N/A	£140,000,000 N/A N/A	10 4	£250,000 £250,000
14	<b>Panacea Financial Services</b>	Panacea House, 100 Manchester Road, Denton, Manchester M34 3PR Tel: 0161 336 4550 www.panacea-fs.com	Iain Crawford, Managing Director	Independent financial advisers and wealth management specialists	2003 Manchester	£112,000,000 N/A N/A	£112,000,000 0% 100%	21 12	£10,000 £10,000
15	<b>Buckland Harvester Ltd</b>	5 The Parsonage, Manchester M3 2HS Tel: 0161 835 9627 www.bucklandharvester.co.uk	Andy Burnett, Director	Wealth managers, benefit consultants, retirement specialists	2005 Manchester	£50,000,000 N/A N/A	£50,000,000 N/A 100%	9 4	£50,000 £50,000
16	<b>Chartered Wealth Management</b>	Hamill House, 112-116 Chorley New Road, Bolton BL1 4DH Tel: 01204 498 933 www.charteredwealthmanagement.co.uk	David Spencer Steven Hall Mark Stanbury, Directors	Independent wealth management advice	2009 N/A	£20,000,000 N/A N/A	£20,000,000 N/A N/A	3 3	N/A N/A
17	<b>Yorkshire Bank</b>	Manchester Financial Solutions Centre, The Chancery, 58 Spring Gardens, Manchester M2 1YB Tel: 0161 839 8398 www.ybonline.co.uk	Christopher Hampson Natalie Beer, Partner, Independent Financial Advises	Provision of business, specialist, acquisition and private banking services	1996 Leeds	£0 N/A N/A	£0 N/A N/A	44 4	£0 £0
-	<b>Bank Hapoalim B.M.</b>	12th Floor, St James House, 7 Charlotte Street, Manchester M1 4DZ Tel: 0161 228 2406 www.bhibank.com	Andy Pearson, Branch Manager Private Banker	Provide wealth management services and solutions and commercial lending and trade finance	1978 Tel Aviv, Israel	N/A N/A N/A	N/A N/A N/A	4 1	£250,000 £250,000
-	<b>Milkstone Ltd</b>	First Floor, Arthur House, Chorlton Street, Manchester M1 3FH Tel: 01612428244 www.milkstone.co.uk	Peter Dzedzora, Chief Executive	Institutional stockbroker and nominated broker to AIM-listed companies	2008 <sup>1</sup> Manchester	N/A N/A N/A	N/A N/A N/A	4 4	N/A N/A
-	<b>Credit Suisse</b>	9th Floor, 82 King Street, Manchester M2 4WQ Tel: 0161 236 7288 www.credit-suisse.com/uk	Simon Racle, Office Head	Provides comprehensive advice and a broad range of investment products and services tailored to the personal needs of high-net-worth individuals globally	2008 London	N/A N/A N/A	N/A N/A N/A	15 7	N/A N/A
-	<b>Arbuthnot Latham</b>	Bartle House, Oxford Court, Manchester M2 3WQ Tel: 0161 236 4431 www.arbuthnotlatham.co.uk	Graham Ball, Associate Director	Banking, wealth management and investment management services	N/A London	N/A N/A N/A	N/A N/A N/A	5 1	N/A N/A
-	<b>Allens Wealth Management</b>	123 Wellington Road South, Stockport SK1 3TH Tel: 0161 477 2636 www.allensaccountants.com	Simon Leigh, Partner	Independent financial advisers and wealth managers	2009 N/A	N/A N/A N/A	N/A N/A N/A	8 7	£25,000 £25,000

<sup>1</sup> Established 2008

Source: Information was submitted by the companies and sourced from public records.

Only companies that respond to the survey are included.

Crain's Manchester Business does not independently verify the information and there is no guarantee these listings are complete or accurate.

All Crain's lists will appear in the 2010 Book of Lists to be published in December 2009. One copy is free to all Crain's Manchester Business subscribers

Local: Greater Manchester and North Cheshire