



**Press Announcement for Immediate Release**  
**London Thursday 11<sup>th</sup> March 2021**

**Canaccord Genuity Wealth Management Named Wealth Management Company of the Year**

At the annual City of London Wealth Management Awards, Natasha Kaplinsky announced that Canaccord Genuity Wealth Management had won the Alpha Terminal Award for Wealth Management Company of the Year. OCM Wealth Management's Jason Stather-Lodge was presented with the CEO of the Year Award in recognition for building a team of analysts and advisors who have been consistently successful.

Brewin Dolphin's Janet Mui was named Best Industry Commentator while John Spiers from EQ Investors was presented with a Lifetime Achievement Award. John founded Bestinvest in 1986 a company with attracted 50,000 customers before sold in 2007. He launched EQ Investors (EQ) in 2014 to uphold high ethical, social and environmental standards; EQ also has a charitable arm which has donated over £1million to charity to date.

Tilney Investment Management won the InvestCloud Award for Best ESG Investment Strategy and JM Finn picked up the individual award for Fund Manager of the Year.

Clay Harris presented the Mudlark Award for Exceptional Performance in the Back Office to Kevin Norman from Canaccord Genuity Wealth Management.

Stephen Pinner, Managing Director of Goodacre UK said *"This year, a record number of over 60,000 votes were polled in an online vote. Wealth Management companies provide an important service and these awards are designed to elevate the profile of the sector and demonstrate the quality of services on offer"*.

**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 took place between 18<sup>th</sup> January 2021 and 12<sup>th</sup> February 2021. Individual awards are based on the number of nominations received, reasons provided with each nomination and information in the public domain. The process is overseen by an independent panel of judges.

COLWMA 2021 is supported by the London Stock Exchange, and sponsored by leading service and system suppliers to the regulated financial services sector, namely Allfunds, FIS | Platform Securities, Clearstream, InvestCloud, Kidbrooke, Alpha Terminal, BNY Mellon | Pershing, Third Financial and XM.

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# City of London Wealth Management Award Winners 2021

## Company Awards

The Kidbrooke Award for Best Advisory Service	<b>Redmayne Bentley</b>
Best CFD Provider	<b>ThinkMarkets</b>
Best Discretionary Wealth Management	<b>Brewin Dolphin</b>
The InvestCloud Award for Best ESG Investment Strategy	<b>Tilney Investment Management</b>
Best Fund	<b>Charles Stanley</b>
Best Fund Platform	<b>True Potential</b>
Best FX Service Provider	<b>XM</b>
Best Goal Based Investment Service (Robo)	<b>Moneybox</b>
Best ISA Provider	<b>Halifax Sharedealing</b>
Best Junior ISA Provider	<b>Bestinvest</b>
Best Market Newsletter	<b>Collins Sarri Statham Investments</b>
Best SIPP Provider	<b>AJ Bell</b>
Best Spread Betting Provider	<b>CMC Markets</b>
Charity Investment Service	<b>JM Finn</b>
Family Office Of The Year	<b>Killik &amp; Co.</b>
Online/Mobile Access	<b>Close Brothers Asset Management</b>
Regional Wealth Manager Of The Year: Northern England	<b>Ramsey Crookall &amp; Co.</b>
Regional Wealth Manager Of The Year: Southern England	<b>Partridge Muir &amp; Warren</b>
The London Stock Exchange Award For Execution-Only Stockbroking	<b>AJ Bell</b>
The Third Financial Award for Best Private Bank	<b>Nedbank Private Bank</b>
The Third Financial Award For Regional Wealth Manager Of The Year: Central & Eastern England	<b>GHC Capital Markets</b>
Regional Wealth Manager of the Year: Wales & Western England	<b>Alpha Portfolio Management</b>
The Alpha Terminal Award for Wealth Management Company Of The Year	<b>Canaccord Genuity Wealth Management</b>

## **COLWMA 2021 Individual Awards**

Mudlark Award for Exceptional Performance in the Back Office	<b>Kevin Norman</b>	<b>Canaccord Genuity Wealth Management</b>
Best Industry Commentator	<b>Janet Mui</b>	<b>Brewin Dolphin</b>
Exceptional Customer Service	<b>Sean Taylor</b>	<b>Canaccord Genuity Wealth Management</b>
Exceptional Customer Service	<b>Dan Beecroft</b>	<b>Charles Stanley</b>
Fund Manager of the Year	<b>Mark Powell</b>	<b>JM Finn</b>
Outstanding Individual Achievement	<b>Frances Noons</b>	<b>OCM Wealth Management</b>
Wealth Manager of the Year (Female)	<b>Claudia Quiroz</b>	<b>Quilter Cheviot</b>
Wealth Manager of the Year (Male)	<b>Tom Scarborough</b>	<b>Charles Stanley</b>
Wealth Management CEO of the Year	<b>Jason Stather-Lodge</b>	<b>OCM Wealth Management</b>
Financial Journalist of the Year	<b>David Miller</b>	<b>Quilter Cheviot</b>
Lifetime Achievement Award	<b>John Spiers</b>	<b>EQ Investors</b>