



Paul Willans, Mazars



Ben Lundie, Hargreaves Lansdown



Marlene Shalton, Chambers Morgan James Financial Management/Thinc Group



Matthew Ayres (on behalf of Lee Coates), Ethical Investors

**THE NBA AWARDS 2008**

# A new breed of award is here – NBAs 2008



Pádraig Floyd congratulates Peter Hargreaves, Hargreaves Lansdown, on his achievement

It's all over for the first ever *High Net Worth New Breed Adviser Awards* for 2008.

The winners received their certificates from *HNW's* editor, Pádraig Floyd, at an event at the *Financial Times* in London on November 27, 2008.

The New Breed Adviser Awards aims to recognise best practice, innovation and delivery of service among the financial advisory community.

Although only in their first year, the awards attracted considerable attention and a high number of entries from financial advisers, planners, wealth managers and discretionary fund managers.

Entrants praised the objectives of the awards to recognise not merely the success of a business, but the achievements of the new breed of adviser who is operating in an ever-changing regula-

tory environment, yet is seeking to drive up standards and shape the future of the industry.

The judging panel consisted of Robert Reid, past president of the Personal Finance Society and managing director of Syndaxi Financial Planning, Nick Cann, chief executive of the Institute of Financial Planning, Bruce Wilson, managing director at Helm Godfrey, Stuart Bayliss, director of Annuity Direct and Peter Horrell, managing director of Barclays Wealth.

The judges were impressed by the strength and depth of so many of the entries to the NBA awards. They were also encouraged by the number of advisers who wanted to take part in a new awards programme that recognise those who are doing their level best to change the advisory industry by tenaciously



Christopher Jordan



Toby Ellington, Applewood



Sital Mehta, Perfect Day



Stephen Greenstreet, Origen



Wayne Evans, Heron House Financial Management



Edward Allen, Thurleigh Investment Managers

pursuing best practice.

The winners are listed below, but the full report on how and why these entrants were chosen by the judging panel will be available on the new *High Net Worth* website – [www.highnetworth-online.com](http://www.highnetworth-online.com).

If you didn't enter this time, put a note in your diary for next year and make sure you take part.

If you did enter, but didn't win on this occasion, don't lose heart. *High Net Worth* will profile all the winners in 2009 about their businesses, their industry and how they have dealt with the changes they have experienced. This will offer everyone an insight into what kinds of efforts are important to achieving success in this industry, yes, but also the awards.

**WINNERS OF THE HIGH NET WORTH NEW BREED ADVISER AWARDS 2008**

**Best financial planner**

Winner: Christopher Jordan, Heron House Financial Management

**Best retirement planner**

Winner: Marlene Shalton, Chambers Morgan James Financial Management/ Thinc Group

**Best post-retirement planner**

Winner: Wayne Evans, Heron House Financial Management

**Best investment adviser**

Winner: Edward Allen, Thurleigh Investment Managers

**Best newcomer**

Winner: Sital Mehta, Perfect Day

**Best ethical adviser**

Winner: Lee Coates, Ethical investors

**Best use of platform technology**

Winner: Hargreaves Lansdown

**Best paraplanner team**

Winner: Applewood

**Adviser firm of the year – training & development**

Winner: Mazars

**Adviser firm of the year – treating customers fairly (TCF)**

Winner: Origen

**Lifetime achievement award**

Winner: Peter Hargreaves, Hargreaves Lansdown

*“The majority of fund-of-funds available in the retail sector are multi-strategy and the portfolio is further broadened by allocating across complementary hedge fund styles”*

