

July 2019

JH&P voted ‘Wealth Manager of the Year’

James Hambro and Partners has been named ‘Wealth Manager of the Year’ at the highly-regarded *Portfolio Adviser Wealth Manager Awards*.

It also earned the top ‘platinum’ award for its Cautious strategy and ‘gold’ for its Aggressive strategy in the large portfolio manager category.

Host and *Portfolio Adviser* Editorial Director Dylan Emery acknowledged the firm’s consistency across all of its portfolio strategies.

The awards were judged by an independent panel of industry experts, each with experience of placing private client investment mandates with wealth management firms. The judges assessed how well JH&P demonstrated it would manage a client’s wealth in a number of given scenarios. This qualitative research was supplemented with performance analysis, based on independent data from Enhance Group.

James Horniman, Partner and Head of the Professional Adviser Services team, said of the win: “These awards are important because they reward our approach to working with professional advisers. We understand that advisers

need not just strong, consistent investment performance, but also a partner who is a good fit with their business. They want a wealth manager with the flexibility to meet the needs of a wide-ranging client base.”

He added: “Our adviser service is a growing part of our business and it’s great to see it getting such recognition.”

Andy Steel, Chief Executive, said: “This is an endorsement of all the hard work we’ve put in and it’s always good to get independent validation of our process and approach.

“It was especially pleasing that the judges recognised our strength across the board. We have invested heavily in the past few years in staff development and recruiting talented and experienced managers. Our robust and collaborative approach ensures all our portfolio managers contribute towards the investment strategy so that every single client has the opportunity to benefit from their deep research into stocks and funds. On top of this we have integrated industry-leading software that helps us identify and analyse risks within portfolios to help us deliver strong risk-adjusted returns.”



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