



FOUNDED IN 2003



£1.2 BILLION RECOMMENDATIONS MADE THROUGH 2014

ON A BUSY DAY THERE CAN BE

1,000

FINANCIAL PLANNING SESSIONS

# IN FIGURES

INTERGRATED WITH 25+ PLATFORM PROVIDERS AND BACK OFFICE SYSTEMS

550,000

RISK PROFILES IN THE LAST 5 YEARS



MORE THAN

6,500 FINANCIAL ADVISERS LICENSED



OVER £3.5BN OF FUNDS IN THE INDUSTRY ARE MANAGED AGAINST DYNAMIC PLANNER RISK PROFILE TARGETS, GROWING FROM £2.3BN A YEAR AGO

1000 RISK PROFILED FUNDS

100 FOR MORE THAN ASSET MANAGERS EVERY QUARTER

AWARD WINNING



OVER 700 FIRMS PROFILE, PLAN AND MANAGE THEIR CLIENTS' WEALTH USING DYNAMIC PLANNER

APPS AVAILABLE ON 3 MAJOR OPERATING SYSTEMS

