

## Mark the commitment

Researched among industry heads, public relations companies and the media, *Professional Adviser's* 50 Most Influential ranking is a tribute to the people in the industry who have had a significant affect on financial advice in the past year.

Most have been working to improve the financial advice landscape for a number of years and *Professional Adviser* readers will recognise names from our previous annual '50 Most Influential Advisers' publications.

This year, however, we have extended the remit to include key figures we believe have been instrumental in shaping the financial advice market yet who are not advisers or IFA trade body members. These include the likes of Dan Waters at the FSA, Aegon chief Otto Thoresen and Tesco's Andrew Higginson, who looks set to change the face of UK financial services.

Advisers, of course, are well represented too, from familiar faces in the media to those like Rebecca Taylor of Dunham FS, who is heavily involved in the IFP and a strong promoter of financial planning.

Given the pressures on all businesses, the work that many in this list have undertaken to help drive the industry forward on top of running their own practices is to be both commended and praised.

The significant commitment made by the individuals concerned and the range of firms and organisations from which the 50 hail, reflects the very deep passion to progress and develop financial advice that exists in every corner of this industry.

**Rob Kingsbury, editor, 50 Most Influential**

## Independence - the key to success

The key to success for any organisation lies in meeting the needs and expectations of clients day after day. Never has this been more important than in a period of unprecedented turmoil and one set to become of keen interest to economic historians.

On behalf of F&C Investments I would like to congratulate each of the IFA firms who made the *Professional Adviser* Top 50 Most Influential list. It's the consistent delivery of unbiased service that underpins the reputation and value of independent advice. At F&C Investments we aim to deliver the products, services and performance that will meet the needs of your clients and help you grow your business. The awarding of a Gold Standard for Fund Management, three years running confirms our commitment.

Increasingly, intermediaries are looking at returns of the F&C European Growth & Income Fund since the appointment of Paras Anand, both in terms of performance and diversifying the sources of income within a portfolio. The performance of the Strategic Bond Fund, managed by Fatima Luis, also warrants attention having recovered strongly after a difficult 2008 through Fatima having the courage of her convictions. As such, both warrant a place in many client portfolios.

While the full impact of the Retail Distribution Review has yet to be felt, for many IFAs the option of outsourcing fund management in respect of at least part of their client bank is increasingly attractive. As such, F&C's Multi Manager offering, managed by Dean Cheeseman, continues to grow in popularity. The range includes the independently risk profiled 'Lifestyle' funds and is designed to sit at the heart of an investment portfolio.

We continue to invest in growing our profile amongst intermediaries and investors and this year signed a deal to extend our sponsorship of Birmingham City. So we were delighted to see our return to the Premier League. At F&C our business focus is on the independent sector and we look forward to continuing to develop a strong, long-lasting and profitable partnership.

**John Yule, head of retail, F&C**



## The 50 Most Influential

The 50 key people shaping the future of financial advisers

- |    |                          |   |
|----|--------------------------|---|
| 1  | <b>Tom Baigrie</b>       | <b>LifeSearch</b>                         |
| 2  | <b>Otto Thoresen</b>     | <b>Aegon</b>                              |
| 3  | <b>Chris Cummings</b>    | <b>AIFA</b>                               |
| 4  | <b>Ivan Martin</b>       | <b>Sesame</b>                             |
| 5  | <b>Trevor Matthews</b>   | <b>Friends Provident</b>                  |
| 6  | <b>Nick Cann</b>         | <b>IFP</b>                                |
| 7  | <b>Mark Dampier</b>      | <b>Hargreaves Lansdown</b>                |
| 8  | <b>Tom McPhail</b>       | <b>Hargreaves Lansdown</b>                |
| 9  | <b>Darius McDermott</b>  | <b>Chelsea Financial Services</b>         |
| 10 | <b>Adrian Lowcock</b>    | <b>BestInvest</b>                         |
| 11 | <b>Andrew Merricks</b>   | <b>Skerritts Consultants</b>              |
| 12 | <b>Martin Bamford</b>    | <b>Informed Choice</b>                    |
| 13 | <b>Alan Steel</b>        | <b>Alan Steel Asset Management</b>        |
| 14 | <b>Meera Patel</b>       | <b>Hargreaves Lansdown</b>                |
| 15 | <b>Ben Yearsley</b>      | <b>Hargreaves Lansdown</b>                |
| 16 | <b>Amanda Davidson</b>   | <b>Baigrie Davies</b>                     |
| 17 | <b>Justine Fearn</b>     | <b>AWD Chase De Vere</b>                  |
| 18 | <b>Peter McGahan</b>     | <b>Worldwide Financial Planning</b>       |
| 19 | <b>Helen Richardson</b>  | <b>Pantheon Financial</b>                 |
| 20 | <b>Brian Dennehy</b>     | <b>Dennehy Weller &amp; Co</b>            |
| 21 | <b>Peter Chadborn</b>    | <b>CBK Colchester</b>                     |
| 22 | <b>Roy McLoughlin</b>    | <b>Master Adviser</b>                     |
| 23 | <b>Alan Lakey</b>        | <b>Highclere Financial Services</b>       |
| 24 | <b>Peter Le Beau</b>     | <b>Income Protection Task Force</b>       |
| 25 | <b>Harry Katz</b>        | <b>Norwest Consultants</b>                |
| 26 | <b>Robert Reid</b>       | <b>Syndaxi</b>                            |
| 27 | <b>Michael Ward</b>      | <b>Direct Life &amp; Pensions (DLP)</b>   |
| 28 | <b>Andrew Fisher</b>     | <b>Towry Law</b>                          |
| 29 | <b>Nigel Callaghan</b>   | <b>Hargreaves Lansdown</b>                |
| 30 | <b>Laith Khalaf</b>      | <b>Hargreaves Lansdown</b>                |
| 31 | <b>Billy Burrows</b>     | <b>William Burrows Annuities</b>          |
| 32 | <b>Danny Cox</b>         | <b>Hargreaves Lansdown</b>                |
| 33 | <b>Neil Liversidge</b>   | <b>West Riding Personal Financial</b>     |
| 34 | <b>Jim Reeve</b>         | <b>Positive Solutions</b>                 |
| 35 | <b>Chris Smallwood</b>   | <b>2plan Wealth Management</b>            |
| 36 | <b>Sheriar Bradbury</b>  | <b>Bradbury Hamilton</b>                  |
| 37 | <b>Simon Chamberlain</b> | <b>Succession (ex-Thinc)</b>              |
| 38 | <b>Jason Walker</b>      | <b>AWD Chase De Vere</b>                  |
| 39 | <b>Gavin Haynes</b>      | <b>Whitechurch</b>                        |
| 40 | <b>Dan Waters</b>        | <b>FSA</b>                                |
| 41 | <b>Amanda Bowe</b>       | <b>FSA</b>                                |
| 42 | <b>Mervyn King</b>       | <b>Bank of England</b>                    |
| 43 | <b>Neil Woodford</b>     | <b>Invesco Perpetual</b>                  |
| 44 | <b>Andrew Higginson</b>  | <b>Tesco</b>                              |
| 45 | <b>Rebecca Taylor</b>    | <b>Dunham Financial Services</b>          |
| 46 | <b>Gillian Cardy</b>     | <b>Professional Partnerships</b>          |
| 47 | <b>David Elms</b>        | <b>Unbiased.co.uk</b>                     |
| 48 | <b>Martin Werth</b>      | <b>Fortis Life</b>                        |
| 49 | <b>Adrian Shandley</b>   | <b>Premier Wealth Management</b>          |
| 50 | <b>George Osborne</b>    | <b>Shadow Chancellor of the Exchequer</b> |

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## The 50 Most Influential



**HELEN RICHARDSON**  
DIRECTOR  
PANTHEON  
FINANCIAL

**19** Richardson, a director with the 90-strong national independent adviser,

operates from the firm's Scunthorpe office in North Lincolnshire.

Although a regionally based IFA, Richardson has had a strong presence in the national press for the past six years, featuring in the *Daily Mail*, *Mail on Sunday* and *Telegraph*. While rarely lead generating, she says her media presence acts more as reassurance for existing clients. "They like the fact that I am approached by the media for my opinion," she says.

Richardson has been an IFA for 16 years and is also director of investment research for Pantheon.

**"Clients like the fact that I am approached by the media for my opinion."**

**BRIAN DENNEHY**  
DIRECTOR  
DENNEHY WELLER

**20** A founding director of Dennehy Weller & Co, Dennehy has been in the financial services industry for more than 20 years and is responsible for managing the production of the firm's research, including the *Top Funds Guide* and the *Dividends Watch Report*, and is a frequent media commentator. Brian's work with the press has made Dennehy Weller a regularly contact point for the media for expert opinion on investment and personal finance issues. Dennehy Weller was originally set up in 1981, specialising in investment management for a worldwide client base. The current management, who also have a legal background, then took over in 1987, broadening the scope of the services, and building a reputation for detailed and incisive research.



**PETER CHADBORN**  
DIRECTOR AND  
ADVISER  
CBK COLCHESTER

**21** Chadborn began his career in financial services in 1988 as an area representative with Refuge Assurance collecting policy premiums from clients in their home. A move to Barclays Financial Management where he progressed to advising high net-worth clients and corporate clients lead to him co-founding Chadborn Baker & Kearle, for advisers who wanted to escape the restraints of large employers with their advisory limitations and product bias.

Chadborn took a decision to work with the media he says, as an important step to help develop the industry and put across the views of the small IFA. "There are too few working IFAs who are prepared to give up their time to comment on industry issues. It is for this reason I have made myself available for comment, attended working events, written features and provide a consultancy service. Views and opinions can readily be obtained from re-insurers, life offices and large IFA firms but rarely can a balanced, consumer focused view be obtained from a typical IFA."