Professional Paraplanner Awards 2026

Headline Sponsor

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Professional Paraplanner 10th Annual Awards

Editor's comment

Our judges

The Paraplanner Winners with profiles

The Provider Awards winners

Meet the Provider winners

Professional Paraplanner Awards 2026

EDITOR'S INTRODUCTION

The 2026 Professional Paraplanner Awards marked a very special milestone as we celebrated the tenth anniversary and in the same year received a record number of entries.

What began in 2017 with just three awards has evolved into a much-looked-forward-to annual event. This year, some 200 guests joined us at Merchant Taylors' Hall in London to celebrate the individuals, teams and providers supporting the profession.

Reaching a tenth anniversary naturally prompts reflection. Over the past decade, the profession has greatly changed; regulation has evolved, client expectations have increased, technology has advanced at remarkable speed, and AI has become one of the biggest talking points.

But despite such change, the need for paraplanning has never been greater. This milestone year has felt especially significant to me, having joined *Professional Paraplanner* as Editor at the start of 2026. Over the past few months, I've had the privilege of meeting many of you, which has reinforced my appreciation of the expertise, commitment and sense of community within paraplanning.

These awards showcase the extraordinary talent within the community and the positive impact paraplanners have on clients, colleagues, firms and the wider advice journey.

The awards are also an opportunity to recognise the providers that support paraplanners so effectively. It has been wonderful to see more and more providers recognise the value that paraplanners bring and invest time, resources and expertise in helping the profession thrive.

As ever, the Awards rely on the support of so many of you. I'd like to thank our judging panel for giving their time; our 2026 Headline Sponsor – Standard Life, for supporting us so brilliantly; Quilter for continuing to sponsor our drinks reception; and all our associate sponsors for their continued commitment to the profession.

I'd also like to thank the *Professional Paraplanner* team in Rich, Rob, Louisa and Amelia, as well as our Research in Finance team, whose hard work brings these awards to life each year.

Congratulations to all our finalists and winners. Here's to the next ten years of celebrating the very best of paraplanning - I am looking forward to it all!

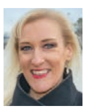
Natalie Dawes
Editor, *Professional Paraplanner*

Judging panel

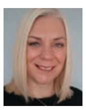
A huge thank you to our 2026 judging panel, who generously gave their time and expertise to review what was an exceptionally strong field of entries. In The Award's tenth anniversary year, we received more entries than ever before, which was fantastic to see. It did, however, give our judges an even tougher job!

Jon Scannell
Head of Individual Annuity Distribution – Standard Life

Paul Ilott
Managing Director – Scopic Research



Kim Sanders
Director – Go Paraplanning



Caroline Stuart
Director – Sparrow Paraplanning

Richard Cooper
Business Development and Accreditation Manager – LIBF

Martin Rooks
Head of Advisory and Partnership – Marketing, Fidelity International

Sam Patterson
Head of Proposition – Equilibrium Financial Planning

Natalie Dawes
Editor – Professional Paraplanner

Rob Kingsbury
Consulting Editor – Professional Paraplanner

Professional Paraplanner Awards 2026

CELEBRATING 10 YEARS OF PARAPLANNING EXCELLENCE

Headline Sponsor

Standard Life

Standard Life was proud to be headline sponsor of the 10th annual Professional Paraplanner Awards, a milestone event recognising the outstanding contribution paraplanners make to the financial advice profession.

Opening the awards ceremony, I highlighted the vital role paraplanners play in helping firms deliver better outcomes for clients. Their technical expertise, attention to detail and ability to turn complexity into clarity continue to strengthen the quality of financial planning and support advisers in delivering advice with confidence. Marking the 10th annual awards provided an opportunity to celebrate not only the achievements of this year's finalists and winners, but also the wider contribution of the paraplanning community. Every day, paraplanners help turn complex planning challenges into clear solutions, supporting advisers and helping clients achieve better financial outcomes.

The calibre of this year's finalists and winners was a powerful reminder of the talent, professionalism and dedication that exists within the paraplanning community. Whether recognised on the day or not, every nominee represents the commitment and expertise that helps underpin great financial advice.

Congratulations to all the winners and finalists, and to Professional Paraplanner for a fantastic event and afternoon. Standard Life is delighted to support an event that continues to shine a spotlight on such an important and influential profession.

Jon Scanell
Head of Individual Annuity Distribution
Standard Life

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Professional Paraplanner Awards 2026

PROFESSIONAL PARAPLANNER AWARDS 2026 - IN PICTURES

The Merchant Taylors' Hall in London was once again the perfect setting for this milestone year – our tenth Professional Paraplanner Awards. Guests celebrated in the picturesque courtyard before entering the great hall for a three-course lunch. The ceremony saw some 200 guests celebrate the achievements of individuals, teams and providers that make a valuable difference to the profession.

Professional Paraplanner Awards 2026

THE 2026 PARAPLANNER AWARDS

One of the privileges of being involved in these Awards is seeing the profession through the eyes of the entrants. We received more entries than ever before, which felt particularly fitting in our tenth anniversary year. For our judging panel, that meant some very difficult decisions, but it also provided a valuable insight into the breadth of talent, dedication and professionalism that exists across the paraplanning community.

In reviewing this year's entries, several themes emerged time and again. Technical excellence was a given, but what stood out just as strongly was the care shown towards clients, the support offered to colleagues and the desire to continually raise standards. The feedback from our judges reflected this. Technical expertise was praised throughout the process, but so too were qualities such as leadership and collaboration. More than once, judges remarked that entrants were the kind of people they would want on their own team. Others highlighted finalists as a "safe pair of hands" for clients and a "reliable and trustworthy sounding board" for advisers.

One comment from a judge particularly resonated with me. They commented on the calibre of talent coming through the profession and how encouraging it was to see, a sentiment I wholeheartedly share. Importantly, this wasn't about age. Exceptional people can be found at every stage of a career, and this year's entries demonstrated exactly that.

Of course, only a small number of entrants can be named winners. Across the following pages, you'll meet this year's winners, alongside those recognised as Highly Commended and shortlisted. Together, they showcase the professionalism and expertise that continue to make paraplanning such an important part of the financial planning profession. And if reading their stories inspires you to consider entering next year, I would encourage you to take that step.

Awards methodology

Our Paraplanner Awards are entered through self-nomination, giving individuals and teams the opportunity to reflect on their role and the impact they make. Entrants completed a 500-word written submission, answering a question relevant to the award category. Those shortlisted then attended an online interview with our friendly, albeit inquisitive, judging panel.

Sam Patterson, Outstanding Contribution of the Year Winner

Damian Zhang, Editor's Choice Winner

Rebecca Montandon, Paraplanner Team Leader of the Year Winner

Professional Paraplanner Awards 2026

Paraplanner of the Year (in house):

Winner: Kyle Kennedy, Trinity Bridge
Highly Commended: Katie Burgess, Crowe Financial Planning
Also Shortlisted:
Damian Zhang, Quilter Cheviot Financial Planning
Helen Johnson, Beckett Financial Services Ltd

Outsourced Paraplanner of the Year

Winner: Alan Gow, Argonaut Paraplanning
Highly Commended: Kate Hall, Verve
Also Shortlisted:
Stephanie Tennant, Accelerate Adviser Solutions
Jawaad Tanwir, ParaplanX

Paraplanner Team of the Year

Winner: Jacksons Wealth Management
Highly Commended: Quilter Cheviot Financial Planning
Also Shortlisted:
Argonaut Paraplanning
Acumen Financial Planning

Paraplanner Team Leader of the Year

Winner: Rebecca Montandon, Barclays Private Bank and Wealth Management
Highly Commended: Devon Cragie, Fairstone Group
Also Shortlisted:
Poonam Patel, Quilter Cheviot Financial Planning
Hannah Wynick, Core Financial Paraplanning

Investment Paraplanner of the Year

Winner: Kate Richardson, Blithe House Financial Management
Highly Commended: Lynsey Gillanders, Westward Financial Management
Also Shortlisted:
Michael Cooke, Verve
Jack Wade, Financial Affairs

New Paraplanner of the Year

Winner: Lynette Baskett, St Barts Finance
Highly Commended: Alex Woodcock, Verve
Also Shortlisted:
Jack Walker, Fairstone Group

Administrator of the Year

Winner: Antoinette Elgar, Argentis Wealth Management
Highly Commended: Kaycey Robinson, GSI Wealth Management
Also Shortlisted:
Drew Lewis, Simpson Wood
Micaela Tadmor, Core Financial Paraplanning

Outstanding Contribution of the Year

Winner: Sam Patterson, Equilibrium Financial Planning

Editor's Choice

Winner: Damian Zhang, Quilter Cheviot Financial Planning

Distinguished Service to the Paraplanning Profession

Winner: Rob Kingsbury, Consulting Editor of Professional Paraplanner

PARAPLANNER OF THE YEAR (IN-HOUSE)

In association with Standard Life

Kyle Kennedy, Trinity Bridge

Kyle Kennedy of Trinity Bridge, started his career straight from college through an apprenticeship route and has now spent almost a decade building his expertise, progressing from administrative roles to becoming a Chartered Paraplanner.

Entering the awards wasn't just about recognition but about taking stock of how far the 10 years under his belt had taken him. "Building the confidence to put yourself out there is something that back-office roles aren't really geared towards," he says. "You have to take the reins and push yourself out of your comfort zone."

The judges were impressed not only by Kyle's technical capabilities, but also by the breadth of his contribution to both his firm and the wider profession. Alongside his core paraplanning responsibilities, he has taken on increasingly influential roles, supporting newer colleagues and contributing to major business projects.

A recurring theme throughout his career has been the importance of the human element.

While technical expertise remains central to his role, Kyle is passionate about helping people, whether that is working with colleagues, contributing to business initiatives or ultimately improving client outcomes. His commitment to the profession includes involvement with the CII's New Generation Programme. Through this initiative – as the only paraplanner on the programme – Kyle is helping raise awareness of paraplanning as a career path while championing greater accessibility for those entering financial services through alternative routes.

Reflecting on the awards process, Kyle described it as a valuable opportunity to step back from the day-to-day and recognise how much he has achieved. "It's invaluable to have that seal of approval – to show you've put the work in."

Kyle Kennedy accepting his award from Pete Cowell, Head of Annuities at Standard Life

The experience allowed him to see beyond individual cases and focus instead, on the broader impact of his contributions. Kyle has a lot to be proud of on the lead up to winning the in-house Paraplanner of the Year award, having built his career from the ground up – turning his technical expertise into wider influence across his firm and the profession.

OUTSOURCED PARAPLANNER OF THE YEAR

In association with transact take control

Alan Gow, Argonaut Paraplanning

For Alan Gow, winning Outsourced Paraplanner of the Year is both a personal achievement and recognition of the standards he has spent years championing within the profession.

Alan entered the awards because he wanted an opportunity to benchmark himself against his peers. Like many paraplanners, much of his career has been spent focused on delivering great outcomes for clients rather than seeking recognition. "You don't really know how your paraplanning abilities sit when you're in your silo working every day," he says. "You don't really see what other people do or how they do it."

15 years on from its launch, Argonaut stands as a testament to Alan's belief in building lasting relationships and delivering better outcomes for clients. While outsourced paraplanning can sometimes be viewed as a transactional service, Alan and fellow director Christina Georgiou have always taken a different approach.

Working with many of the same adviser firms and end clients year after year has enabled the team to develop a deep understanding of the people behind the plans, bringing valuable context and continuity to their work. "We're not a transactional paraplanning service," Alan says.


Stuart Fleat, Head of Distribution at Transact, presents Alan Gow with his award

"If you can build that relationship and cement it, that's got value for the client, for the adviser and for the paraplanning firm."

This commitment allows the team to act as an additional layer of oversight, using years of accumulated knowledge to spot potential issues and support advisers in delivering better client outcomes. The judges were particularly impressed by Alan's ability to balance technical expertise with the challenges of running and growing a successful outsourced business. His willingness to continually learn and adapt also stood out.

From transitioning to a fully remote business post-pandemic to embracing new technologies, Alan sees change as an opportunity to evolve while maintaining the human insight he believes underpins great paraplanning. Reflecting on the awards, Alan encourages others to enter. "The experience is fantastic because it challenges you to step back and see how far you've come."

PARAPLANNER TEAM OF THE YEAR

In association with Dentons Pensions

Jacksons Wealth Management

Team of the Year – Jacksons Wealth Management – impressed judges with their unbeatable team spirit, commitment to continuous improvement and obvious enjoyment of what they do.

Their 2026 Awards entry was a collaborative approach including Jackson's leadership team, who felt it was time to recognise the contribution being made by paraplanners across the business.

"We were trying to get recognition for what our team are doing," says Tom, who leads the paraplanning team. "We do think we are doing things a bit differently."

That culture came across strongly during the interview process. "I was quite nervous," admits Zoe. "But it was really nice listening to everyone because we were all saying the same sorts of things."

Tom, Ellis, Claire and Zoe accepting the award for the Jackson's paraplanning team, presented by David Fox of Dentons Pensions

When Jacksons was announced as the winner, the overwhelming feeling was pride. "It was validating," says Claire. "I felt very proud of all of us as a paraplanning team."

For Zoe, the award reflected something bigger than the team itself. "I felt really proud for the wider Jacksons team. I felt like we had won that for Jacksons."

The win also highlights how paraplanning has evolved within the business. Team members are involved in planning discussions, work closely with advisers and play an integral role in shaping client outcomes, while maintaining a culture that places as much emphasis on enjoying the work as delivering it. "You're not just doing reports," adds Ellis. "It's cashflow modelling, it's working with advisers, it's joining meetings. No day is the same."

Looking ahead, Jacksons has ambitious plans, including the creation of a Jacksons academy to help bring new talent into the profession and showcase paraplanning as a career in its own right. "Growth is on our mind," says Tom. "It's about education, showing people what we're doing and making it more of a career."

This is a team that combines ambition with a healthy dose of fun and winning Team of the Year feels like recognition of how far they have come.

PARAPLANNER TEAM LEADER OF THE YEAR

In association with Fidelity International

Rebecca Montandon, Barclays Private Bank and Wealth Management

Rebecca Montandon's entry for Team Leader of the Year was almost a bit of an afterthought.

Her focus was initially on recognising the achievements of her team. Having spent years championing paraplanning and advocating for greater recognition within Barclays Private Bank and Wealth Management, she submitted an entry for Team of the Year before eventually deciding to put herself forward as well.

"I am really proud of the team and what we have achieved," she says. "Then I thought about myself in that and how I'd contributed to it and thought – why not!"

That moment of reflection has proven significant. The 2026 awards judge's were particularly impressed by Rebecca's role in raising the profile of paraplanning within a large organisation, where securing meaningful change requires dedication and is aided by a passion for your cause.

Through persistence and strong stakeholder relationships, she has helped ensure paraplanners receive greater visibility, recognition for the value they bring to the client and colleague journey and a structured development path.

"I've had to sit in that room and reflect, 'We deserve more. This is what the team are doing and showcase the quality and value of what we deliver,'" she says.

Rebecca receives her award from Martin Rooks, Head of Advisory and Partnership - Marketing at Fidelity International

Over the past year, Rebecca successfully shone a light on her team and the profession, helping colleagues better understand the impact paraplanners have on client outcomes and the wider advice process. Her efforts not only increased recognition for the team but also helped create new opportunities for its continued growth. While Rebecca is quick to credit those around her, she spoke candidly about the confidence challenges she has faced throughout her career.

The awards process gave her an opportunity to step back and recognise the impact of her own contributions, something she admits she rarely does. After 14 years with Barclays, spanning operations, paraplanning, advice and leadership, winning Team Leader of the Year is recognition of a professional who has consistently supported others while helping elevate the standing of paraplanning itself.

INVESTMENT PARAPLANNER OF THE YEAR

In association with

TIME INVESTMENTS

Kate Richardson, Blithe House Financial Management

Winning an industry award is an achievement. Winning the same award two years running is something altogether rarer. This year, Kate Richardson of Blithe House Financial Management, was named Investment Paraplanner of the Year for the second consecutive year, cementing her reputation as one of the profession's leading investment-specialism paraplanners.

Despite such achievement, Kate remains characteristically modest about her success. Having entered the awards for a second time, she admits she never expected to hear her name called out again. "I didn't expect to win it again," she says. "I wanted to, but I didn't expect to."

For Kate, the awards process itself has proved invaluable, helping to strengthen her confidence and recognise the value she brings to both clients and colleagues. It has also reinforced what others within the profession see – a highly skilled paraplanner whose technical expertise is matched by her commitment to continual learning and development.

This was an important side for Kate, having an independent judging panel see things in her that she doesn't always see in herself.

The judges were particularly impressed by Kate's technical knowledge, her client-focused approach and the wider contribution she makes to the profession. Alongside her day-to-day role, she is an active mentor through The Paraplanning Club – a free mentoring service that professional Paraplanner has supported for many years.

Kate is also a passionate advocate for paraplanning as a career in its own right and winning the Award – two years in a row – has opened doors for her to share that passion further.

As well as being invited and featuring on an expert panel at a Paraplanning Excellence seminar last December, Kate was also asked to contribute to a panel discussion at another industry event, hosted by Scottish Widows' Sarah Sandle, a direct result of her 2025 award win.

While Kate may still be surprised by the recognition she receives, a second consecutive award leaves little room for doubt about the impact she is making.

Kate Richardson picks up her second straight Investment Paraplanner of the Year Henny Dovland of TIME Investments

NEW PARAPLANNER OF THE YEAR

In association with

M&G

Lynette Baskett, St Barts Finance

Lynette Baskett's original motivation for entering the 2026 Professional Paraplanner Awards was not personal recognition. Instead, she wanted to raise awareness of both her local firm and the paraplanning profession.

"Nobody seemed to know what a paraplanner was," she says. "I thought if I entered for this award, our company could show how paraplanners support advisers, how they enhance the advice and hopefully give prospective clients more confidence in the services we provide. It was about shining a light on paraplanning."

That ambition makes her success as this year's New Paraplanner of the Year particularly fitting. Having joined St Barts Finance as its sole paraplanner, Lynette quickly found herself supporting a growing business. Preparing her award submission gave her an opportunity

Les Cameron - Head of Technical at M&G presents our New Paraplanner of the Year award to Lynette Baskett

to reflect on what had been achieved during a relatively short time. The judging process, however, was not without its challenges. "I found the interview quite daunting," she admits. "There were a lot of people that knew their stuff."

Despite her nerves, she encourages others to enter. "It was more like a job interview than I imagined it would be, but everyone was very kind. Don't let my nerves put you off!"

On the day itself, Lynette was simply hoping for a Highly Commended recognition, making the announcement of her win all the more memorable. "I was so shocked," she recalls. "I was absolutely amazed and delighted."

Since then, the award has helped her connect with others across the profession. Where Lynette's next step is to become an adviser, these new connections provided her unexpected reassurances from others, where they too are in what she calls the 'floating stage' of being somewhere in between paraplanning and advice.

While her own career continues to evolve, her commitment to promoting paraplanning remains unchanged. In that respect, winning New Paraplanner of the Year has already helped achieve one of her original goals in raising awareness of the vital role paraplanners play in delivering great financial advice.

ADMINISTRATOR OF THE YEAR

In association with

ammonite

Caroline Duff, ammonite CEO, congratulates Antoinette Elgar of Argentis Wealth Management on her award

Antoinette Elgar, Argentis Wealth Management

After just 18 months as a financial planning administrator, Antoinette Elgar of Argentis, has already established herself as one of the profession's rising stars. Having spent six years on the platform side of financial services, Antoinette moved into administration to gain a deeper understanding of the advice process, seeing it as the ideal foundation for a career in financial planning. The move has proven to be a wise one, culminating in her being named Administrator of the Year.

Entering the awards gave Antoinette an opportunity to reflect on everything she had achieved in a relatively short space of time. "The experience of going through the Awards entry process is fantastic and really helps build a perception of yourself and what you do," she says.

That period of reflection reinforced something she feels strongly about, in that administration is far more than a support role. Antoinette says administrators sit at the centre of the client journey, coordinating activity between clients, advisers, providers and paraplanners, to keep everything moving forward.

"Administrators are the link," she explains. "We talk to providers, clients and different teams internally. The paraplanners put the research together, the advisers present the recommendations, but without us in the first instance none of that could happen."

The judges were particularly impressed by Antoinette's understanding of the wider advice process and the pride she takes in delivering exceptional client experiences.

She believes that when a client's journey appears seamless, it is often because a skilled administrator has been working diligently behind the scenes to make it happen.

Looking ahead, Antoinette hopes to become an adviser and is passionate about encouraging more women to pursue careers in financial planning. Equally, she wants to see administrators receive the recognition they deserve. Highly ambitious and deeply committed to helping others, Antoinette is a worthy winner whose future in financial planning looks exceptionally bright.

OUTSTANDING CONTRIBUTION OF THE YEAR

In association with

SCOTTISH WIDOWS

Sam Patterson, Equilibrium Financial Planning

This year's Outstanding Contribution of the Year award recognised Sam Patterson, Head of Proposition at Equilibrium Financial Planning, for his continued efforts to raise the profile of paraplanning and for sharing knowledge across the profession, in particular on student loans.

For Sam, the award was a bit of a shock. "I was over the moon, surprised, but over the moon," says Sam. "It means so much to me to be recognised by other people in our profession."

While his career has evolved beyond a traditional paraplanning role, Sam remains passionate about the profession and the skills that underpin it. "Paraplanning is being an impartial expert that weighs up different options to pick the right choice based on what the fundamentals say," he explains. "If everyone applies that mindset to their role, you're only going to have a better outcome."

That philosophy is reflected in Equilibrium's advice model, where paraplanners, known as 'client managers', play a central role in client relationships and planning. With a significantly higher ratio of client managers to advisers than many firms, Equilibrium has long recognised the value of technical expertise and client support within the advice process.

During our post-awards interview, Sam reflected on how financial planning will change. He believes technology will continue to play a part reshaping advice process, but not at the expense of paraplanners. "AI will take tasks, it won't take jobs," he says. "Paraplanners are going to become more confident and be able to do more. The value they add will go up."

As a judge of the Professional Paraplanner Awards, he has also seen first-hand the quality

Sam Patterson of Equilibrium Financial Planning receives his award from Sarah Sandle, Marketing Manager at Scottish Widows

emerging across the profession. "The people coming through are incredibly impressive."

Asked about what the award meant to him, "an award like this, received in front of hundreds of people, gives you a bit of an unexpected platform" he says. "I hope others see some of the fantastic personalities growing from the paraplanning community and making the case for what paraplanners are capable of."

EDITOR'S CHOICE

AN AWARD TO CELEBRATE PROFESSIONAL PARAPLANNER'S 10-YEAR ANNIVERSARY

Damian Zhang, Quilter Cheviot Financial Planning

To mark the 10th anniversary of the Professional Paraplanner Awards, the Editor's Choice Award was created to recognise an individual whose contribution extends beyond the traditional boundaries of paraplanning.

This year's recipient – Damian Zhang of Quilter Cheviot Financial Planning, was a standout choice. Over the past year, Damian has become a respected voice within the profession, combining a commitment to innovation with a genuine passion for supporting others.

His willingness to share his own experiences of mental health challenges has helped encourage open conversations around wellbeing and provided reassurance to colleagues facing similar struggles.

Having navigated his own journey, Damian has used that experience to support others as a

PP Editor Natalie Dawes, presents the award to Damian Zhang, Paraplanner at Quilter Cheviot Financial Planning

Mental Health First Aider, helping colleagues access support and creating an environment where people feel comfortable asking for help.

"If I can make someone else's life a little bit easier and a little less painful, that makes me happy," he says.

The award also recognises Damian's growing influence in the field of AI. Once a self-confessed sceptic, he has embraced emerging technology and become an advocate for its responsible adoption within financial planning.

Through presentations, industry discussions and practical application within his own role, he has helped others better understand how AI can enhance efficiency while allowing paraplanners to focus on delivering greater value to clients.

Damian says, "It won't replace paraplanners, it's a great tool that can help us do an even better job, we can be more technical and do more for clients"

What makes Damian particularly deserving of this recognition is the way he combines professional development with a genuine desire to help others succeed. Whether supporting wellbeing, sharing knowledge or encouraging the thoughtful use of technology, his focus is always on having a positive impact.

In a special year for the awards, Damian's contribution to both the profession and the people within it made him a worthy recipient of the inaugural Editor's Choice Award.

DISTINGUISHED SERVICE TO THE PARAPLANNING PROFESSION

Rob Kingsbury, Professional Paraplanner

Just when he thought it was all over, we totally surprised Rob at the Professional Paraplanner Awards ceremony by presenting him with this one-off Distinguished Service to the Paraplanning Profession award.

Rob stepped down as editor of *Professional Paraplanner* in January 2026, after 12 years in the role.

The publication was launched in 2014, with Rob at the helm, and quickly went from strength to strength, adding the website, our events and the awards along the way.

Rob said: "I hope that, in its own way, *Professional Paraplanner* has helped to raise the profile of paraplanning in the industry.

"I've been editing financial services magazines for nearly 30 years, and I can honestly say that being editor of *PP* has been the best and most enjoyable of my editorial roles. When I was asked by Richard Ley and Toby Finden Crofts, the co-founders of Research in Finance, the publisher of *PP*, if I'd take on the role, I jumped at it. Firstly, because there is a real buzz around launching a new magazine, but also, I knew this was a community of people that was being overshadowed by the focus on advisers in our industry and really needed and deserved a dedicated publication of their own.

"I was both surprised and humbled that my time as editor should be recognised in this way. But what was better than receiving the award, was when after the awards ceremony, the new editor, Natalie, came up to me and said "I LOVE this job".

"If I leave a legacy, it's passing the reins to someone who cares as much about *PP* as I have and who is already making her mark


A one-off award presented to Rob Kingsbury, former PP Editor to recognise his impact on the profession

on the role and will do new things with it and take it to new heights in serving the paraplanning community.

"Paraplanners are at the heart of great advice to consumers and it has been an honour and a pleasure to be the editor of their magazine over the last 12 years."

Professional Paraplanner Awards 2026

THE 2026 PROVIDER AWARDS

The Provider Awards remain one of the most meaningful elements of the Professional Paraplanner Awards because they are determined by the people who use providers' products and services every day. Rather than being decided by a judging panel, these awards are driven entirely by nominations from paraplanners themselves, making them a genuine endorsement from the profession. Thank you to everyone in the paraplanning community that had their say.

This year, the awards expanded to 21, with the introduction of three new awards that reflect the evolving financial planning landscape. Best AI Technology Provider recognises that artificial intelligence is no longer a future concept but a growing part of everyday working life. The award highlights the providers helping paraplanners work more efficiently, giving them more time to focus on the areas where human expertise adds the greatest value.

Best Annuity Provider acknowledges the changing retirement income market, where annuities are increasingly being reconsidered as part of retirement planning. We also introduced Best Protection Provider to reflect the growing focus on protection planning and the important role it plays in helping clients and their families build financial resilience.

As the profession continues to evolve, so too do the expectations placed on providers. While strong products and propositions remain essential, paraplanners consistently tell us that the quality of support they receive is what truly sets providers apart.

It has been encouraging to see more providers recognise the value that paraplanners bring and actively engage with the profession. Providers that genuinely understand paraplanners' needs and respond to them are often those that stand out when nominations are submitted.

Congratulations to all our winners and Highly Commended providers. Importantly, thank you once again to the paraplanners who took the time to submit nominations and share their feedback. Your insights help ensure these awards continue to recognise the providers making the greatest difference to the profession.

Provider awards methodology

This is not a tick box exercise for paraplanners, but it is a straightforward process. We ask paraplanners to nominate the provider they believe has delivered the best product, service or support in each category. The provider receiving the most nominations is named the winner, while the provider with the second-highest number of nominations is recognised as Highly Commended.

Best Overall Service to Paraplanners - New Business
Winner: Quilter
Highly commended: Transact

Best Overall Service to Paraplanners - Existing Business
Winner: Quilter
Highly commended: Transact

Best Technical Support to Paraplanners
Winner: M&G
Highly commended: Quilter

Best Training Resource for Paraplanners
Winner: Bespoke Training Solutions
Highly commended: Brand Financial Training

Best Research Software
Winner: FE Analytics
Highly commended: Defaqto Engage

Best AI Technology Provider
Winner: Saturn
Highly commended: PlannerPal

Best Back-Office Software Provider
Winner: Intelliflo
Highly commended: XPlan

Best Platform
Winner: Transact
Highly commended: Quilter

Best Third Party Support/Compliance Service
Winner: CATS
Highly commended: SimplyBiz

Best Provider Website
Winner: M&G
Highly commended: Aberdeen

Best Independent Product or Service Provider
Winner: IDAD
Highly commended: ammonite

Best Active Investment Solution Provider
Winner: Fidelity International
Highly commended: M&G

Best Passive Investment Solution Provider
Winner: Vanguard
Highly commended: Fidelity International

Best Sustainable Investment Solution Provider
Winner: EdenTree Investment Management
Highly commended: Aviva Investors

Best Tax-Efficient Service Provider
Winner: TIME Investments
Highly commended: Foresight

Best Outsourced Investment Firm
Winner: Tatton Investment Management
Highly commended: Brewin Dolphin

Best Offshore Product Provider
Winner: Canada Life
Highly commended: Utmost

Best Retirement Solution Provider
Winner: Royal London
Highly commended: Quilter

Best Full SIPP and/or SSAS Provider
Winner: AJ Bell
Highly commended: Dentons Pensions

Best Annuity Provider
Winner: Legal & General
Highly commended: Standard Life

Best Protection Provider
Winner: Royal London
Highly commended: Zurich

BEST OVERALL SERVICE TO PARAPLANNERS – NEW & EXISTING BUSINESS

Quilter

"Being voted Best Overall Service for both New and Existing Business demonstrates that Quilter delivers excellence across the entire client lifecycle"

Winning awards for either new or existing business service would be a strong result for any provider but securing both in the same year, that suggests something broader. This year, Quilter was voted Best Overall Service to Paraplanners in both categories, while also being recognised as Highly Commended for Best Technical Support to Paraplanners and Best Platform.

For Matthew Elson, Head of Platform Specialists, the combination reflects the experience paraplanners have throughout the client journey. "Being voted Best Overall Service to Paraplanners for both New and Existing Business demonstrates that Quilter delivers excellence across the entire client lifecycle, from onboarding through ongoing servicing," he says.

"Most importantly, these accolades are based on the views of paraplanners themselves, the professionals who interact with our platform and service teams every day."

Much of Quilter's focus over the past year has been on strengthening its connection with the paraplanning community and creating more opportunities to hear directly from those working within advice firms. Through its partnership with Professional Paraplanner's Tax and Trust Zone, Quilter is delivering a wide range of practical content. It has also launched a new partnership with Paraplanners' Assembly featuring a programme of educational webinars. Together, these initiatives are helping the business to better understand the realities of the role and the pressures firms are facing.

Quilter has also continued to develop its growing paraplanner community and panel initiative, creating additional opportunities to gather feedback and engage directly with the professionals using its services. "We've continued to listen and respond to what matters most to paraplanners," says Matthew. "They're looking for reliable service, knowledgeable support, straightforward processes and solutions that help them deliver better outcomes for clients."

That understanding has become increasingly important as paraplanners navigate a more complex planning environment. Changes to pensions and inheritance tax planning continue to generate questions for firms, while wider regulatory developments place greater demands on time and technical expertise.

"Regulatory change, taxation reforms, estate-planning considerations and changing client expectations all place additional demands on their time and expertise," says Matthew.

To help meet those demands, Quilter provides access to a dedicated field-based Technical Team for more complex planning requirements. Support is also available through Platform Specialists and Wealth Management Consultants, while the firm's online resources include technical content, support materials and calculators designed to help paraplanners find answers quickly.

Listening to feedback is also playing a central role in shaping future developments. "Insights gathered through client interactions, service feedback, complaints, user research and engagement forums are used to identify pain points, prioritise development activity and shape future enhancements."

Several of those enhancements are already underway. Improvements to Quilter's Transfer Tracker will give users greater visibility of outstanding transfers and any actions required. The firm is also working to increase straight-through processing across transfer journeys, streamline trust processes ahead of the 2027 inheritance tax changes and create a fully digital route for moving money from the CashHub into tax wrappers. Given the volume of transfers processed by the business, improvements to transfer tracking and processing have the potential to deliver meaningful efficiency gains for advisers and paraplanners alike.

Taken together, the projects share a common objective – reducing friction in processes that paraplanners encounter every day. Matthew says this year's awards are ultimately about the people who use Quilter's services. "We're genuinely grateful to every paraplanner who took the time to vote for us," he says.

"Winning more awards really tells us we are doing the right things for our clients. We look forward to building on this success and continuing to work alongside the paraplanning community in the years ahead."

Quilter's Head of Distribution Support, Sophie Ryves and Retirement Specialist Adam Cole collecting the provider's Best Overall Service to Paraplanners across Existing Business award


For UK financial advisers only
Two awards.
One shared goal.
Helping you deliver better outcomes for your clients.
Professional Paraplanner Awards 2026
Winner
Best Provider Website
Professional Paraplanner Awards 2026
Winner
Best Technical Support to Paraplanners
M&G
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BEST TECHNICAL SUPPORT TO PARAPLANNERS & BEST PROVIDER WEBSITE

M&G

Ten years of the Professional Paraplanner Awards, meaning ten years of recognising excellence across the profession. Although a lot has changed in that decade, one thing has stayed the same – nominations continue to flow in for M&G to pick up Best Technical Support to Paraplanners. This year marked the provider's tenth consecutive win in the category, alongside a second successive Best Provider Website award and Highly Commended recognition for Best Active Investment Solution Provider.

Les Cameron, Head of Technical at M&G, says the achievement is one that never feels guaranteed. "I genuinely believe every year that this is the year we're not going to win," he says.

That humility perhaps reflects the pace of change within the profession. As legislation evolves and technical complexity continues to increase, providers have invested heavily in the support they offer advisers and paraplanners, but M&G, year-on-year has continued to stand out. Part of that success stems from the way the M&G technical team approaches its role. Rather than focusing first on products or processes, Les says the team's starting point is always financial planning. "When we see a change in legislation, the first thing we think about is how it affects the planning," he explains.

That focus is particularly important at a time when paraplanners are being asked to absorb an ever-growing volume of technical information while continuing to meet the demands of their day-to-day role. "I think the biggest challenge is having the time to deal with everything that's changing and keep up to date," says Les. "My job is to stay up to date with technical stuff – it's really hard and highly time consuming.

M&G's Les Cameron, Head of Technical, and Shoaib Ahmed, Senior Technical Manager, collecting the team's 10th Best Technical Support award

Paraplanners have reports to write, research to do and clients to support as well."

Helping paraplanners manage that challenge is where M&G believes it adds real value. "We read everything that comes out, filter out all the stuff that doesn't matter and explain the things that do in a way that's as quick to consume as possible," he says. "We cut through the noise."

That philosophy extends beyond webinars, events and technical updates. It also underpins M&G's award-winning website, which has become a go-to resource for paraplanners seeking technical guidance. Following a significant redesign, the site has made it easier to access the extensive content the team has built over many years. Les told us: "The content was always there, we just needed to make it easier to access."

For paraplanners looking to engage directly with the team, there are several routes available. Alongside the technical resources available on the website, users can submit questions via their 'Ask an Expert' button, while M&G's dedicated LinkedIn community provides a space for discussion and another way to ask questions.

"Join the community, get involved, tell us when you want something." Les is clear he wants the profession to be open with the provider about things they need to support them in their roles.

Looking ahead, M&G continues to invest in the support it provides, with further developments planned across its proposition. The firm is developing what Les describes as a significantly enhanced trust proposition – aimed squarely at improving the experience for advice professionals. One aspect of the overhaul is a more digital trust journey – M&G hopes to reduce the number of incomplete applications and remove some of the friction that can slow trust business down.

"It's quite easy to miss information on a digital journey because you don't get to the next stage unless you've completed what's required," says Les. The result should be cleaner submissions, and a much smoother process. Alongside a review of trust-related technical resources, the changes reflect M&G's focus on solving practical challenges rather than adding complexity.

The team is also exploring how AI could enhance the user experience, while maintaining the human oversight that remains essential when dealing with complex planning matters.

For Les, the real measure of success remains in the relationship M&G has built with the profession. "Getting to 10 years when there is so much excellent technical support available and we're still out there in front is just amazing. I'm immensely proud of the team," he says.

> ***"Getting to 10 years when there is so much excellent technical support available and we're still out there in front is just amazing"***

Professional Paraplanner Awards 2026

BEST TRAINING RESOURCE FOR PARAPLANNERS

Sean, Alex, Anna and Jude collect BTS's sixth consecutive award for Best Training Resource for Paraplanners

BTS

For many paraplanners, professional qualifications are pursued alongside client work, deadlines and everything else that comes with a demanding role. Finding the time to study is one challenge and knowing where to focus that effort is often another.

Helping remove some of that uncertainty has long been central to the BTS approach, and it is one of the reasons why the business has been voted Best Training Resource for Paraplanners for the sixth consecutive year at the Professional Paraplanner Awards.

"This award is hugely significant to us because it is nominated by the very people we are here to support," says Alex Langhorn, Head of Learner Success at BTS, a Davies company. "It tells us that paraplanners value the support they receive from BTS and that we are helping them achieve their qualification goals."

While BTS became part of Davies in 2024, Alex says the qualities that originally attracted learners remain unchanged. "Practical support, plain English resources, approachable people and a team that genuinely understands the pressure of studying alongside a demanding role are still at the heart of what we do," she says.

For BTS, the award is not simply recognition of learning materials. It reflects a philosophy built around making technical qualifications more accessible and helping learners progress with confidence. "This is our sixth consecutive year winning this award and I think that reflects the relationships we have with our learners and the clients we work with," says Alex.

As firms place greater value on technical expertise, many paraplanners are progressing beyond core qualifications and moving into advanced and specialist areas. "Paraplanners are operating in an increasingly technical and demanding environment," Alex explains. "Many are balancing heavy workloads with the need to progress through qualifications and deepen their technical knowledge."

In response, BTS has continued to evolve the support available as paraplanners' responsibilities grow. Since becoming part of Davies, learners have been able to benefit from the firm's broader People Development offering, spanning professional qualifications, apprenticeships and continuing professional development. BTS supports paraplanners across the full qualification journey, from core R0 examinations through to advanced AF units, J0 papers and specialist areas such as mortgage advice, equity release and long-term care planning.

BTS is also working with firms to create more structured learning pathways, helping paraplanners build expertise that aligns with both their career ambitions and the needs of their organisation. One example is the recently launched Level 4 Paraplanner Apprenticeship programme, which is already supporting new entrants into the profession and helping firms develop the next generation of paraplanning talent.

Feedback continues to shape much of that development. "We know learners value convenient, bitesized study support," says Alex. "Staying close to learners helps us respond to real pain points rather than making assumptions about what support should look like."

Technology is also creating new opportunities. While BTS sees potential for AI to support more personalised learning journeys, Alex is clear that expertise must remain at the centre of professional development. "The opportunity is not to replace the tutor, technical expert or human learner support, but to make learning more responsive."

For Craig Potter, Senior Partner at Davies, the 2026 Professional Paraplanner award demonstrates the continued strength of the BTS proposition. "We are incredibly proud to be recognised as the industry's leading training resource for paraplanners for the sixth consecutive year," he says. "This award reflects the positive impact our learning solutions continue to have."

Alex added: "A huge thank you for remembering us when you came to place your vote. We do not take that trust lightly. BTS has grown and evolved, particularly since becoming part of Davies, but our purpose remains the same – to help learners feel less overwhelmed, more confident and better prepared. We are incredibly grateful for the support."

> *"BTS has grown and evolved, but our purpose remains the same – to help learners feel less overwhelmed, more confident and better prepared"*

intelliflo

Professional Paraplanner Awards 2026
Winner
Best Back-Office Software Provider

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BEST BACK-OFFICE SOFTWARE PROVIDER

intelliflo

"[AI is] here. It isn't going away. Firms need to understand what problem they're trying to solve and then look at the technology"

Winning Best Back-Office System at the Professional Paraplanner Awards carries particular significance for intelliflo. Voted for by the people who use the system every day, the award reflects the experiences of paraplanners working at the heart of advice firms.

Alan Easter, Chief Commercial Officer at intelliflo, said that recognition is something the business doesn't take for granted. "It is a privilege," he says. "We have around 2,800 firms using intelliflo and about 30,000 users. With that kind of market share, we work very hard to keep customers happy. The fact that people continue to choose us, continue to use us and continue to vote for us is something we're very grateful for."

Rather than pointing to product launches or major developments, Alan believes much of the credit belongs to the teams who work behind the scenes supporting users on a daily basis.

"Our customer success and experience teams are speaking to users all day long. They're helping with training, answering questions and dealing with issues when they arise. They're the people maintaining those relationships."

In that respect, he sees some clear parallels with paraplanners themselves. "Paraplanners aren't always the headline act within a firm, but they're essential to making sure the business operates properly. Our customer-facing teams play a similar role."

Asked why he believes paraplanners continue to vote for intelliflo, Alan's answer is wonderfully simple. "The market sometimes becomes obsessed with shiny new things," he says. "AI is exciting and new functionality is exciting. But before you get to any of that, you've got to get the basics right."

Those basics often come down to having confidence in their data. "One of the most important things a paraplanner needs to know is how much a client is worth, what they have and where. Those things have to be accurate."

With around £550bn of client assets recorded on the platform, Alan believes intelliflo's longstanding focus on integrations continue to be one of the reasons users trust the system. "Paraplanners don't want to log into multiple platforms to build a picture of a client's position. They want one place to go to and confidence that what they're looking at is accurate."

These 'basic' foundations also shape how the intelliflo is approaching one of the biggest conversations currently taking place across financial planning – AI. Alan shared a simple message. "It's here. It isn't going away. Firms need to understand what problem they're trying to solve and then look at the technology."

Just as importantly, he warns against assuming AI alone being the answer. "The winner isn't going to be the firm with the best AI tool. The winner is going to be the firm with the best processes and the best data. If you've got poor processes and poor data, adding AI won't solve that."

Kaveeta Rana and Louise Lyons, Customer Success Managers at intelliflo, accept the award at the ceremony

Instead, he sees AI as an opportunity to enhance the work paraplanners do rather than replace it. "AI doesn't replace jobs. What it replaces are tasks."

It is a distinction he feels is important given the concerns that still exist across the profession. "We're not seeing businesses looking to remove people. What we're seeing is an increase in output and an increase in quality. The question becomes how that time is reinvested."

For paraplanners, that could mean spending less time on repetitive administrative tasks and more time focused on technical work and client outcomes. "If technology can take away some of the manual work, it creates more space for those areas where they add the most value."

Looking ahead, intelliflo is investing heavily in AI-powered capabilities, including transcription services, suitability support, compliance tools, pre-meeting packs and workflow automation. Alan believes those developments will significantly change the way advisers and paraplanners interact with technology over the next couple of years. At the same time, he believes one challenge will remain constant: "Complexity."

Alan believes paraplanners continue to shoulder an enormous responsibility when it comes to understanding and navigating an increasingly complex landscape. Supporting that expertise remains central to intelliflo's plans, with continued investment in integrations and creating what Alan describes as a connected advice environment, enabling firms to access data and third-party tools more seamlessly.

For now, though, the focus remains on the award itself and the endorsement behind it. "Our market position is a privilege. The awards are a privilege," he says. "We'd like to say thank you to the *Professional Paraplanner* community for voting for us again. We'll continue to work hard and hopefully earn that support again next year."

Professional Paraplanner Awards 2026

BEST PLATFORM

Transact's Head of Distribution, Stuart Fleat, accepts the provider's award for Best Platform

Transact

Financial planning has become even more complex particularly in light of the frequent changes to pension rules and taxation. Implementing advice for households can now involve multiple tax wrappers, trusts, bonds and intergenerational planning strategies, alongside the day-to-day tasks and ensuring recommendations are put into practice efficiently.

It is a challenge that Transact has been working hard to address, and one that saw the provider voted Best Platform at this year's Professional Paraplanner Awards, while also being recognised as Highly Commended for Best Overall Service to Paraplanners across both new and existing business.

Andrew Cullen-Jones, Chief Development Officer at Transact, says: "Paraplanners are arguably the biggest users of our technology, so being voted for by them adds even greater credence to the value of these awards."

"I'd like to think they reflect the hard work we've put in to help make financial planning easier, not just for advisers but for everybody who contributes to the delivery of high-quality financial planning across the UK."

While the awards recognise both platform capability and service, Andrew believes the two are closely connected. Over recent years, Transact has focused on making it easier for firms to implement advice, whether through digital developments, stronger integration with adviser software or improvements to the service experience. "The complexity of financial planning has increased and so has client demand for advice around intergenerational wealth planning," he says.

That complexity is particularly apparent in estate planning. For many clients, advice extends beyond having sufficient income in retirement to consideration of trusts, gifting strategies and wealth transfers across generations. Andrew says the increase Transact has seen in investment bond and trust applications over the past 18 months reflects that shift. Responding to these changing requirements has shaped much of Transact's recent development programme. The firm has continued to move more processes online while enhancing functionality designed to reduce administration and improve efficiency for advisers and paraplanners. Recent improvements include online bond applications, online pension income and crystallisation functionality, as well as enhancements to managing family-linking online too.

At the same time, Transact has continued to invest in behind-the-scenes connectivity. "We've devoted significant resources into developing our API technology so that data can flow freely between our platform and the technology used by paraplanners," says Andrew.

Alongside platform enhancements, service remains a major focus for the business. Transact's regional servicing teams are designed to provide continuity, allowing paraplanners to build relationships with people who understand their business and can anticipate the support they need. "Great service isn't just about getting things right first time," says Andrew. "It's also about being there when things don't go as planned and helping to put things right."

Another area where Transact has sought to differentiate itself is transparency. Andrew believes platform charging remains an area where greater clarity is needed, particularly when it comes to the treatment of cash interest.

While many providers retain a proportion of interest earned on client cash, Transact pays all interest earned on client money back to clients and continues to campaign for greater transparency across the industry.

Feedback from advisory firms plays a significant role in shaping the platform's development priorities. Through surveys, conversations with firms and roundtable events, the business gathers insight into where additional support or functionality may be needed. "Most of our development work is shaped by feedback from advisory firms or their clients," says Andrew.

Two recent developments highlight that approach. The first is Transact's new Flexible Reversionary Trust, designed to support intergenerational wealth planning as firms prepare for forthcoming inheritance tax changes. The second is an online bond calculator that enables users to compare proportional and segmental bond withdrawals.

Andrew says developments like these are a response to the reality of modern financial planning. Advice is becoming more complex and implementing recommendations is taking more time as client circumstances become increasingly nuanced. Transact's aim is to ensure paraplanners have the tools they need to navigate that complexity as effi-ciently and easily as possible.

"Paraplanners are arguably the biggest users of our technology, so being voted for by them adds even greater credence to the value of these awards"

Professional Paraplanner Awards 2026

BEST THIRD PARTY SUPPORT / COMPLIANCE SERVICE

Compliance and Training Solutions (CATS)

Martyn and Mel Holman, Directors, delighted to pick up CATS' 6th Professional Paraplanner award

Trust is not something that can be built overnight. For Compliance and Training Solutions (CATS), it has been earned through years of supporting adviser and paraplanning firms as they navigate an increasingly complex regulatory environment. That trust was evident once again at this year's Professional Paraplanner Awards, where CATS was named Best Third-Party Support/Compliance Service for the sixth consecutive year.

Managing Directors Mel and Martyn Holman, say the award carries particular significance because it comes directly from the profession. "Winning this award for the sixth consecutive year is an incredible honour because it is voted for by paraplanners themselves," Martyn said, with Mel adding: "Recognition from the people who use our services carries a special significance."

The relationship CATS has built with paraplanners is rooted in a practical approach to compliance. Rather than focusing solely on regulation, the team works with firms to help them understand what is required and how best to implement it. "I believe paraplanners continue to nominate CATS because we understand the challenges they face and focus on providing practical, commercial support rather than simply quoting regulations," says Mel.

That philosophy is reflected in the support available through the CATS HUB, which provides access to compliance resources, training materials, regulatory guidance and ongoing support.

The HUB has a straightforward aim - in reducing the time firms spend interpreting requirements and to give them greater confidence in their processes. "Our role is to remove complexity and give paraplanners the tools, knowledge and confidence they need to excel in their roles," Martyn explains.

The need for that support continues to grow. Consumer Duty, evidencing client outcomes, ongoing FCA scrutiny and professional development requirements all place demands on firms that are already operating in a busy environment. "CATS helps by translating regulatory expectations into practical actions," says Martyn. "Our aim is always to make compliance feel manageable rather than overwhelming."

Alongside its technology and resources, CATS has placed a strong emphasis on fostering collaboration. Quarterly meetings with paraplanning firms, a dedicated Teams channel and regular opportunities to share best practice have helped create a community where members can learn from one another while maintaining a consistent approach.

Listening to that community has also shaped the firm's future direction. Feedback from clients has played a key role in the ongoing development of the CATS HUB, influencing new functionality, reporting capabilities and the resources available to users.

This year has been an important one for the business following the launch of a refreshed brand identity and a relaunch of the CATS HUB.

While the visual identity may have changed, Martyn and Mel say that their objective remains the same in helping firms operate effectively while delivering good outcomes for clients.

Looking ahead, one of the most significant developments is the introduction of enhanced CPD functionality within the HUB, giving firms a more structured way to manage professional development and maintain accurate records. Further investment in training content and educational programmes is also planned over the coming months.

For the CATS team however, the greatest achievement remains the confidence that firms continue to place in the business.

On behalf of the team, Martyn and Mel shared some words of appreciation: "Quite simply, thank you. To receive this level of support for six consecutive years is both humbling and motivating. Every vote represents trust, and we never take that for granted."

Six consecutive awards is a brilliant achievement. More importantly, the awards reflect the role CATS continues to play in helping paraplanners tackle regulatory challenges with confidence and provide reassurance that support is always close at hand.

"To receive this level of support for six consecutive years is both humbling and motivating. Every vote represents trust, and we never take that for granted"

BEST INDEPENDENT PRODUCT OR SERVICE PROVIDER

IDAD

"We're very grateful to everyone who took the time to vote for IDAD. It's a real endorsement of the work our team puts into supporting paraplanners and advisers"

Structured products remain an area of financial planning that often invites questions. Where do they fit? When are they appropriate? How do they compare with other investment solutions available to clients?

Helping answer those questions has become a core part of what IDAD does, and that commitment to education and support was recognised at this year's Professional Paraplanner Awards, where the firm was voted Best Independent Service Provider.

"Paraplanners are often the people working through the detail of a client's financial plan and turning advice into something that can actually be implemented," says Terry Dixon, Sales Director at IDAD. "We're very grateful to everyone who took the time to vote for IDAD. It's a real endorsement of the work our team puts into supporting paraplanners and advisers."

Terry talked about how the recognition is not really about products. "For us, the award is less about the products themselves and more about the role we can play in helping paraplanners and advisers deliver good client outcomes."

That support takes many forms, but education is central to the approach. Structured products can sometimes be perceived as complex, so a large part of IDAD's role is helping paraplanners assess whether a solution may be relevant to the client sitting in front of them. "We hope the recognition is because we try to make life a little easier for paraplanners," says Terry. "A big part of what we do is take the complexity out of the conversation and provide practical support that can be used when considering a client's circumstances and objectives."

Through CPD, presenting at Professional Paraplanner Technical Insight Seminars and through providing practical educational content, IDAD aims to give paraplanners the information they need without requiring them to become specialists in a single product area.

"There's a lot being asked of paraplanners," says Terry. "Workloads remain high, regulation continues to evolve and clients are having increasingly complex conversations around IHT, retirement planning, sustainable income needs, and investment risk."

At the same time, he believes there is still work to do in challenging outdated assumptions about structured products. "There is still a need to challenge some of the misconceptions around structured products," he says. "We see part of our role as helping paraplanners understand where these solutions fit in, and just as importantly, where they may not."

That balanced approach is important to IDAD. The firm is not advocating structured products as the answer to every planning need. Instead, it wants them to be considered fairly alongside other solutions. "We want to give paraplanners the confidence to have informed conversations about structured products as part of a wider financial plan, rather than expecting them to become specialists in every technical detail."

Advisers and paraplanners are also influencing the conversations taking place within IDAD. "We're hearing more about the need to balance growth whilst managing risk, particularly as clients move from the accumulation to the decumulation phase of their retirement cycle," says Terry.

That insight helps shape both the products the firm brings to market and the way it communicates them. As the structured product market continues to evolve, Terry believes the industry has an opportunity to look beyond historic perceptions and focus on the role these solutions can play today.

"Structured products have moved on considerably and deserve to be judged on what they are today, rather than perceptions of what they may have been in the past," he says.

Recognition from the paraplanning community suggests that message is resonating. "We'll continue listening to what paraplanners need and do everything we can to make structured products easier to understand and consider."

Strategic Partnership Managers Hattie Berryman and George Burnett represent IDAD and collect the award for Best Independent Product or Service Provider

BEST ACTIVE INVESTMENT SOLUTION PROVIDER

Fidelity International

Paraplanners rarely judge an investment provider on investment capability alone. The quality of support, accessibility of information and responsiveness of the people behind the proposition all play an important role. Those factors helped Fidelity International secure this year's Best Active Investment Solution Provider award at the 10th anniversary Professional Paraplanner Awards.

Dennis Pellerito, Head of UK Wholesale at Fidelity International, says the recognition is particularly meaningful because it comes directly from the profession. "We're absolutely delighted to receive this award, particularly because it's voted for by paraplanners themselves," he told *Professional Paraplanner*.

"Paraplanners play a critical role in delivering positive client outcomes, so to be recognised by the professionals who work most closely with our solutions is especially rewarding."

The award reflects the trust that paraplanners place not only in Fidelity's investment expertise, but also in its broader commitment to supporting adviser businesses. Dennis backed this approach in telling us that the combination of investment capability and practical support is what underpins Fidelity's approach.

"We've focused on providing high-quality investment solutions that are designed to meet a wide range of client needs, while also making it easier for paraplanners to access the information, tools and support they need," he says. "Ultimately, we aim to be an industry-leading and reliable partner that helps advisers and paraplanners deliver better outcomes for clients."

Supporting paraplanners has become increasingly important as the profession continues to navigate a challenging environment.

Martin Rooks – Head of Advisory and Partnership – Marketing, at Fidelity International accepts the award on behalf of the team

Regulatory change, evolving client expectations, market uncertainty and growing demand for personalised advice all place pressure on advisers and the teams supporting them.

Dennis spoke about how paraplanners are often balancing multiple priorities at once. "We recognise that paraplanners are often working under significant time pressures," he says. "That's why we focus on providing not only robust investment solutions, but also practical support."

A key part of that support is delivered through Fidelity Adviser Solutions and the firm's dedicated Paraplanner Technical Hub. Designed to help paraplanners find the information they need quickly, the hub provides access to regulatory and legislative updates, technical guidance, retirement planning resources, training support and due diligence materials.

Alongside its digital resources, Fidelity continues to invest in face-to-face engagement and educational initiatives. "We appreciate that paraplanners work in different ways," says Dennis. "Our dedication to online and in-person events allows paraplanners to access our expertise in the way that best suits them."

Listening to advisers and paraplanners also remains central to how Fidelity develops its proposition. Feedback gathered from users helps shape enhancements to existing solutions while informing future developments. One recent example is the launch of Fidelity WealthBuilder MPS, which expands the firm's offering for advisers looking for cost-effective managed portfolio solutions backed by Fidelity's investment expertise.

While investment solutions remain at the core of Fidelity's proposition, this year's award highlights the value paraplanners place on support, accessibility and partnership. Speaking on behalf of Fidelity International Dennis highlights that this sort of recognition is something the business never takes for granted.

"This recognition is particularly meaningful because it comes from paraplanners, whose professionalism and expertise are so important to the advice process. We remain com-mitted to supporting you with high-quality investment solutions, valuable insights and excellent service, and we look forward to continuing to work together in the years ahead."

> *"To be recognised by the professionals who work most closely with our solutions is especially rewarding"*

BEST SUSTAINABLE INVESTMENT SOLUTION PROVIDER

EdenTree

Adam Kelly, Regional Sales Director collects the award on behalf of the EdenTree team

Sustainable investing has faced no shortage of scrutiny in recent years. Regulatory change, shifting terminology and increasing expectations around transparency have all contributed to a more challenging environment for advisers and paraplanners trying to navigate the market.

That makes EdenTree's win as Best Sustainable Investment Solution Provider at this year's Professional Paraplanner Awards all the more notable, highlighting the confidence paraplanners continue to place in the firm's proposition.

Charlie Thomas, Chief Investment Officer at EdenTree, told us the award is recognition of the firm's commitment to remaining steadfast in its approach. "In a time where there is perceived uncertainty around sustainable investing, to come out and be recognised that we're genuine and honest is important," he says. "We're here for the long term."

While some firms have reduced their focus on sustainability in response to changing market sentiment, EdenTree has continued to lean into the space. Charlie believes that commitment matters, not just for investors, but also for paraplanners seeking confidence that a provider's actions match its messaging. "Some may be stepping away, maybe some are a bit shy to it," he says. "We're stepping forward into that."

Across the profession, consistency has become increasingly important. The growth of sustainable investing has created a vast array of products, approaches and terminology, often making fund selection and due diligence more complex than it needs to be.

Charlie has spent more than two decades working in sustainable investing and has witnessed that evolution first hand. "What you've seen is this mushrooming of terminology," he explains. "It's created barriers to understanding."

The challenge for paraplanners is then translating those differences into clear client conversations while remaining confident that investments are doing what they claim to do. "I think it's about simplicity," he says. "People want a clear message. They need a clear understanding of what we do and how we do it." Charlie says.

That philosophy has underpinned EdenTree's approach to the FCA sustainability labels. The firm took the decision to apply labels across its entire range, a move that required significant investment and commitment from teams across the business. "We took the lead on it," says Charlie. "Every single fund is labelled."

For EdenTree, the labels are about far more than regulatory compliance. They provide a framework that helps advisers and paraplanners understand exactly what a fund is designed to achieve and the standards it is expected to meet. The benefit for paraplanners is a reduction in the time spent navigating competing claims or analysing differences in sustainability approaches across the market. "What we're saying is you don't have to trawl the whole market and understand every nuance," he explains. "You know what to expect."

"In a time where there is perceived uncertainty around sustainable investing, to be recognised that we're genuine and honest is important"

That focus on transparency also helps strengthen trust between adviser firms and clients. By reducing uncertainty and providing greater clarity, EdenTree aims to make sustainable investment decisions easier to research, explain and implement.

Looking ahead, Charlie says the firm's priority is not to launch products simply to follow industry trends. Instead, EdenTree is focused on building on what it already believes is one of the broadest sustainable investment offerings available, spanning fixed income strategies, equity funds and infrastructure solutions.

"We've got a really strong waterfront of opportunities for people to invest," he says. "It's about driving more opportunities through those products rather than chasing the next new idea."

That disciplined approach reflects the firm's wider belief that sustainable investing should be viewed through a long-term lens. Although sentiment towards the sector may shift over time, Charlie says they remain convinced that the fundamental investment case is strong.

"The long-term narrative around sustainable investment is still as strong as ever," he says.

For EdenTree, the award serves as validation that paraplanners continue to recognise the value of that approach. "These awards are more than just awards," says Charlie. "They reinforce that what we're doing is being recognised."


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BEST TAX-EFFICIENT SERVICE PROVIDER

Henny Dovland, Business Development Director, and BDMs Maryam Safi & Henry Vallis of TIME Investment, presented with the award for Best Tax Efficient Service Provider award

TIME Investments

Tax-efficient planning remains one of the most valuable areas of financial advice, yet it is also one of the most technically demanding. For paraplanners, staying on top of changing rules while supporting advisers and clients requires a significant investment of time and expertise.

This year's Professional Paraplanner Award for Best Tax Efficient Service Provider went to TIME Investments. The team said the recognition means a great deal where it comes from such a knowledgeable audience. They said, "It is a strong endorsement of the quality of our solutions and the role they play in supporting advisers and their clients."

While investment solutions remain central to TIME's proposition, the firm's relationship with paraplanners extends well beyond the products themselves. The business sees its role as supporting advisers and paraplanners through the increasingly complex challenges they face every day. "We believe TIME was recognised this year because we have built strong relationships with paraplanners by acting as a trusted partner with a genuine understanding of the challenges they face, not just a product provider."

That support comes in many forms, from helping with due diligence queries to providing educational content and planning support. The objective is to give paraplanners access to the information they need when they need it, allowing them to focus their time where it adds the greatest value. "Time is one of the most valuable resources for paraplanners," the firm says. "Our focus is on providing the tools and guidance they need to work efficiently and make informed decisions."

A key part of that approach is TIME's dedicated Adviser Centre, which brings together technical information alongside client-facing resources and due diligence materials in a single location. The intention is simple: to reduce the time spent searching for answers and make it easier for paraplanners to assess the suitability of a solution for their clients.

That need for clarity has become increasingly important as the advice profession navigates ongoing regulatory change and tax reforms. At the same time, advisers and paraplanners are expected to demonstrate ever greater confidence in the suitability of the solutions they recommend. "Market uncertainty has increased the need for robust due diligence and confidence in investment solutions," the firm says.

To help meet that challenge, TIME continues to invest in educational support, technical resources and thought leadership designed to make complicated subjects easier to understand and communicate. Alongside this, its governance framework and use of independent external valuations are intended to provide an additional layer of confidence for advisers, paraplanners and their clients.

The firm is also continuing to develop its support based on the feedback it receives from the profession. Regular conversations with advisers and paraplanners, alongside other industry partners, help shape new resources. "We believe the best developments come from listening closely to those we work with," the firm says.

Looking ahead, TIME sees significant opportunities in both technology and the wider estate planning market. While AI is expected to improve efficiency across research and administration, human expertise remains central to effective financial planning. "We see AI as a tool that can help professionals spend less time on administrative tasks and more time focusing on client relationships."

At the same time, estate planning conversations are becoming broader in scope, moving beyond inheritance tax to focus on wealth transfer and supporting families across generations. TIME is continuing to invest in resources and planning tools to help adviser firms respond to those changing needs.

Reflecting on the award, the team had a simple message for the paraplanning community. "A sincere thank you to everyone who voted for us. We recognise that earning the trust of paraplanners is something that must be built over time, and this award reflects the relationships we have developed across the profession."

"We remain committed to listening, providing practical support, and developing resources that help advisers and paraplanners deliver the best possible outcomes for their clients. Thank you for your confidence in TIME and for recognising the work of our fantastic team."

"We recognise that earning the trust of paraplanners is something that must be built over time, and this award reflects the relationships we have developed across the profession"

Professional Paraplanner Awards 2026

BEST OUTSOURCED INVESTMENT PROVIDER

Tatton Investment Management

> *"We are firm believers in creating proper working relationships with advice firms and that needs people talking to people"*

Capacity remains one of the biggest challenges facing advice businesses. As firms look for ways to serve more clients without compromising quality, outsourced investment management continues to play an increasingly important role.

This year's Professional Paraplanner Award for Best Outsourced Investment Firm suggests many paraplanners believe Tatton Investment Management is helping firms achieve exactly that. Lothar Mentel CEO and CIO Tatton Investment Management commented: "It's a really big win for us and one that we really value. We know that paraplanners are the engine room behind an IFA's advice, so being recognised by them is humbling and an award we celebrate."

The firm believes successful outsourcing is about much more than investment management alone. While model portfolios can help create scalability, the service wrapped around them is equally important. "In order for MPS to offer genuine scalability to an adviser practice, the service levels that support them need to be as rigorous and disciplined as the investment strategy they support," Lothar explains.

"We are committed to providing the highest levels of service to make doing business with Tatton uncomplicated, and we like to think that this award is a reflection of this."

That commitment to making life easier for paraplanners runs throughout the firm's approach. While technology has an important role to play, Tatton believes strong working relationships remain the foundation of effective support. "We are firm believers in creating proper working relationships with advice firms and that needs people talking to people," Lothar says.

Dedicated account managers and investment specialists work closely with firms, giving paraplanners access to experienced support when they need it. Alongside that personal support sits the Tatton Portal, which allows firms to manage reporting, onboarding and investment communications in one place. Lothar says, "The combination of slick tech and a knowledgeable professional team is a compelling combination."

However, some of the support Tatton provides happens behind the scenes. The team regularly assists with platform issues and risk profiler queries, helping paraplanners overcome challenges that are often outside of their direct control. "It's the kind of service that isn't written in a brochure but makes a difference."

Courtyard at The Merchant Taylor's Hall where guests were welcomed and enjoyed a post awards drinks reception

As demand for financial advice continues to grow, scalability remains high on the agenda for many firms. Tatton sees its role as helping paraplanners create capacity and implement recommendations efficiently without adding unnecessary complexity. "The need for advice has never been stronger, so increasing capacity and scalability are a key focus for paraplanner teams," Lothar told *Professional Paraplanner*.

The business has also continued to evolve in response to feedback. Lothar says Tatton's entire proposition was originally created through conversations with advice firms. "Tatton itself was created through dialogue with advice firms, and we have always encouraged and acted on paraplanner and adviser feedback."

Like many providers, Tatton is also exploring the opportunities presented by AI. The firm sees particular value in using technology to remove repetitive administration and free up time for higher-value work.

"AI cannot replace the human interaction of financial advice, and it cannot replace the work of a paraplanner's experience and understanding, but it can make their lives easier," Lothar says.

Ultimately, Tatton believes good support is often measured in small moments rather than headline developments. Helping resolve a platform issue, supporting a risk profiler query or making a process easier to complete may not attract much attention on their own, but collectively they can have a meaningful impact on a paraplanner's working day.

Those are often the areas that matter most to paraplanners, and the team believes this year's award reflects that day-to-day support. It is an approach Tatton intends to continue. "Our message to the paraplanners that voted for Tatton is simple: thank you, we won't let you down."

BEST FULL SIPP AND/OR SSAS PROVIDER

AJ Bell

AJ Bell has been named Best Full SIPP Provider, an accolade made even more meaningful by the fact that it was voted for by paraplanners themselves. Accepting the award, Kirsty Zollinger said she was delighted with the recognition, particularly because it came from a profession that plays such a vital role in delivering quality financial planning advice.

"Being recognised by paraplanners is especially rewarding," she said. "They are an incredibly important part of the advice process and a community we are passionate about supporting."

That commitment is rooted in AJ Bell's understanding of the profession and the challenges paraplanners face. Kirsty, who worked as a paraplanner herself before joining AJ Bell, is keenly aware of the expertise, dedication and attention to detail the role demands.

"Paraplanners are often the unsung heroes of the profession," she said. "They are instrumental in helping advisers deliver great outcomes for clients, and we want to do everything we can to support them and ensure they receive the recognition they deserve."

A key part of that support has been AJ Bell's 'Connect', a dedicated event series created specifically for paraplanners. The events hosted this year provided a platform for technical learning, industry insight and networking with peers ensuring that those studying towards chartered status align their learning with the syllabus content.

Kirsty Zollinger - Senior Events Manager at AJ Bell accepts the award over a post ceremony lunch with PP Editor Natalie Dawes

The 2026 series featured guest speaker Adam Pinfold, Multi-asset Investment Specialist at M&G, alongside a range of AJ Bell experts covering topics relevant to paraplanners and the wider advice market.

AJ Bell also provides ongoing support through their webinar series, giving professionals access to a wide range of educational sessions, while the firm's 'Infocentre' hosts a library of on-demand resources including market insight, technical guides, videos, commentary and practical support materials.

AJ Bell continuously updates its educational offering to reflect industry developments and changes in regulation. With tax planning becoming increasingly complex, industry debate around wrapper selection is growing. Watch out for AJ Bell's Great Wrapper Reset, which will help you gain greater confidence in the planning challenges that lie ahead.

The award win in 2026 demonstrates the strength of AJ Bell's relationship with the paraplanning community, and highlights the value that professionals place on the support the firm provides.

For Kirsty, the recognition is particularly special because it reflects the views of the people AJ Bell is striving to help.

"We're committed to championing paraplanners, providing meaningful support and creating opportunities for professional development," she said. "To be voted Best Full SIPP Provider by paraplanners themselves is something we are incredibly proud of."

As paraplanners continue to play an increasingly important role in the advice process, AJ Bell's focus on education, engagement and recognition is helping ensure they have the tools & support needed to thrive and 'feel good, paraplanning'

"We're committed to championing paraplanners, providing meaningful support and creating opportunities for professional development. To be voted Best Full SIPP Provider by paraplanners themselves is something we are incredibly proud of"

BEST ANNUITY PROVIDER

Legal & General (L&G)

"Paraplanners play a vital role in helping advisers deliver the right outcomes for clients, and it is a real privilege to be trusted as the annuity provider behind those recommendations"

"Awards voted for by paraplanners are never taken for granted."

It is the first thought that comes to mind for Cecilia Furner, L&G's Distribution Director of Retail Retirement, when reflecting on the provider's success at this year's Professional Paraplanner Awards. "It is recognition not just of our solutions, but of the commitment, expertise and service our teams provide to help paraplanners and advisers deliver great outcomes for their clients," she says.

That recognition is particularly significant this year, with Best Annuity Provider making its debut in the awards. The new category reflects the growing role guaranteed income is playing within retirement planning as retirement strategies are increasingly being built that combine certainty with flexibility.

"Being recognised as Best Annuity Provider by the people who work with our solutions every day means a great deal to us," says Cecilia. "Paraplanners play a vital role in helping advisers deliver the right outcomes for clients, and it is a real privilege to be trusted as the annuity provider behind those recommendations."

Beyond the recognition itself, the award reflects the changing nature of retirement advice. "As retirement becomes more complex, paraplanners are increasingly using annuities alongside other solutions to build more resilient retirement income strategies for their clients," she says.

Retirement planning is one area where L&G believes paraplanners are facing increasing demands. Furner argues that the challenge is no longer simply understanding individual products but bringing together different aspects of a client's financial life to create a coherent recommendation. "One of the biggest challenges for paraplanners today isn't a lack of technical knowledge," she says. "It's navigating an increasingly connected retirement landscape."

Decisions around retirement income can have implications for taxation and estate planning, while also influencing wider later-life considerations. Helping clients understand those connections is becoming an increasingly important part of the planning process. "We believe our role goes beyond providing products," says Cecilia. "It's about equipping paraplanners with the insight, tools and expertise to navigate an increasingly complex retirement landscape."

At L&G, support starts with access to experienced people. Its regional Business Development Managers work closely with advisers and paraplanners, while Retirement Income Quote specialists provide support on quotes and product-specific queries. The provider has also invested in digital tools designed to reduce friction in the annuity application process. L&G Apply, a digital application platform, pre-populates client information and removes the need for wet signatures, helping improve efficiency and reduce delays.

Research continues to shape the firm's understanding of how people experience retirement and what drives financial confidence in later life. Findings from L&G's Happiness in Retirement research suggest that people receiving a guaranteed income are 51% more likely to report lower stress levels and 27% more likely to say their finances are predictable and easy to manage.

For L&G, those findings reinforce the value that guaranteed income can play within a wider retirement strategy. Rather than viewing retirement planning as a choice between one solution and another, the business is seeing increasing interest in approaches that combine the certainty of an annuity with the flexibility of drawdown. "We know guaranteed income can provide valuable peace of mind," says Cecilia.

Understanding what matters most to retirees is helping shape the next stage of L&G's proposition. Alongside product development, the business continues to invest in the tools and support that advisers and paraplanners need to deliver better retirement outcomes.

L&G is continuing to invest in its digital journeys while expanding the support available to advisers and paraplanners. Initiatives such as the Adviser Academy, its Consumer Duty Alliance partnership and ongoing research programmes are designed to help firms have more informed conversations about retirement planning.

Cecilia says the award is about more than a single proposition or development. "It reflects the strength of the relationships we've built across the advice community," she says. "It recognises the expertise of our people, our commitment to listening to feedback and our determination to make it easier for advisers and paraplanners to do business with us."

Jo Coan, L&G's Strategic Partnership Director, Emma Hollington, Marketing Manager, and Sarah Gauci, Account Development Manager, are presented with a new award for 2026, Best Annuity Provider

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