

Company Profile

Canaccord Genuity Wealth Management (CGWM) is an award-winning UK wealth manager, and one of the top 10 independent wealth managers in the UK. We have successfully grown our business and reputation over the years and now in the UK and Europe our investment professionals manage and administer £33.3|bn of assets (as at 30 June 2022).

CGWM is an important part of Canaccord Genuity Group Inc., a Canadian publicly listed company established in 1950. The wider Canaccord Genuity group is a leading global financial services firm, operating in wealth management and capital markets.

Our clients are at the centre of what we do, and helping them to meet their personal investment requirements is our primary objective.

The best way for us to achieve this over the long term is by aiming to grow the real, inflation-adjusted value of each client's assets in accordance with their individual risk profile.

We have enough size and scale to deliver experience and expertise, combined with a highly developed and up-to-date technical infrastructure. This provides efficient and effective investment management, as well as economies of scale that allow us to be price competitive. At the same time we are small enough to provide a personal relationship-led service with direct access to our people and knowledge.

Why did you want to sponsor the report?

We wanted to publicly demonstrate our commitment to investing responsibly. At CGWM our focus is on generating positive client outcomes, and working with ESG Accord helps to add value to our DFM proposition, ensuring that our IFA partners can improve their ability to assess their clients ESG and sustainable practices within their suitability process. Advancing education and training on this subject is very important and was a driving factor as to why we sponsored this report.

What are you actively doing in the ESG & Sustainable space?

We continue to focus on creating an investment proposition that encourages advisers to have meaningful discussions with their clients around sustainability challenges. We are very active in discussing our proposition with our IFA partners and providing seminars and workshops to their employees on the subject.