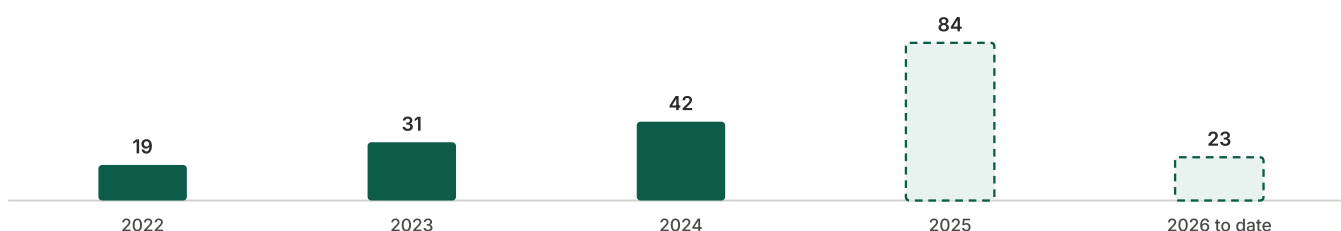


UK financial advisory / wealth consolidation: Autumn 2026

199

UK deals by buy-and-build platforms in financial advisory / wealth since January 2022, as filed at Companies House



■ UK deals as filed at Companies House ■ Still filling in: less than a year of filings behind it

Source: ExitRadar analysis of Companies House filings. Free to reuse with attribution to ExitRadar.

45

Deals in the twelve months to 25 October 2026

28

Platforms buying in the last twelve months

16.9%

Companies at £250k–£5m EBITDA already part of a group

£158k

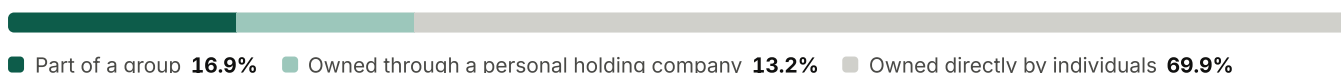
Typical EBITDA going in (median)

40

Independent companies in our top band for exit readiness today

Who owns the trade

1,224 active UK financial advisory / wealth companies have £250k–£5m of EBITDA. 16.9% of them are already part of a group; the rest, owned by individuals, are the pool buy-and-build platforms buy from.



Platforms buying in the trade

Among the platforms that bought in the last two years, named from a public source, alphabetically: Clear Group, Perspective Financial Group, Shackleton, Söderberg & Partners, Specialist Risk Group.

Inside the trade

Sub-trade	Deals
Insurance broking	30
Wealth & discretionary management	25
Financial planning (IFA)	24
Mortgage & protection advice	1

Bought companies labelled from their own descriptions; a company can sit in more than one sub-trade.

Read online and build a buy box for Financial Advisory / Wealth: www.exitradar.co.uk/reports/state-of-buy-and-build/autumn-2026/financial-advisory-wealth