THE BRITISH
WILLS & PROBATE
AWARDS 2026

OPEN TO WEALTH MANAGEMENT FIRMS ONLY

Wealth Management Firm of the Year

With changing family dynamics, frozen tax thresholds and an increasingly burdensome tax landscape, never more so than now has a holistic approach to estate planning been needed. It is not enough to prepare only for death; holistic planning that prepares clients for both life and death is critical.

In a brand new category for the British Wills and Probate Awards, the Wealth Management Firm of the Year will be proactively working with legal professionals to provide a rounded service for clients that encompasses the full range of financial and estate planning services.

A trusted confidante, this category recognises firms delivering expert advice, allied to service excellence. The judges will be looking for evidence of technical expertise, strong collaborative relationships, strategic insight and delivery excellence, with the client at the heart of the partnership.

Criteria

The winner of this award will:

- evidence expertise and skills in the area of wealth management and the implications for wills, probate, tax, trusts and/or estate planning
- provide details of collaborative relationships with private client professionals
- evidence a portfolio of consistently outstanding financial planning, investment management, and personalised client services
- evidence recruitment, retention and training of staff with high levels of skill and technical ability
- demonstrate a clear approach to technology, IT security and cyber-crime prevention