

Investment Life & Pensions
Moneyfacts[®]
Awards 2024
 Categories and Methodology



PROVIDER CATEGORIES

Two elements make up the awards judging; the first is a financial adviser testimonial process that takes place between 29 January 2024 and 5 April 2024, whereby advisers nominate their top three providers across protection, retirement and investment products and services. Advisers are free to nominate any providers, rather than having to select from a predetermined list. These results are then given over to the analytical expertise of our research team, who will thoroughly examine each provider, their products and their activity during the preceding 12-month period to come to the final decisions. For the Innovation Award and Best Technology in the Investment Life & Pensions Sector, we also talked to advisors and providers via a number of routes, including self-submission and our annual adviser survey. The information provided ensures that we are aware of all instances in the industry where new initiatives or innovative offerings have been put into place, or where exceptional technology solutions have made a real difference to the industry.



ADVISER CATEGORIES

Throughout spring, entries are invited from advisers. We also consult our provider contacts for their thoughts on who should be considered. Advisers complete a questionnaire providing details of their organisation, their level of expertise and how they deliver their advice proposition and are asked to support this with evidence of their ability to deliver award-winning service. Based on submission quality, a shortlist is drawn up and announced in May. Shortlisted advisers can then invite testimonials (submitted via an online form) until late June 2024. An internal judging panel assesses these to decide upon the final positions.

	Provider Product Categories	Provider Service Awards	Adviser Categories
Best Annuity Provider	✓		
Best Business Protection Provider	✓		
Best Claims Support		✓	
Best Critical Illness Provider	✓		
Best Discretionary Fund Manager	✓		
Best Equity Release Provider	✓		
Best Equity Release Service		✓	
Best Ethical Discretionary Fund Manager	✓		
Best Ethical Investment Provider	✓		
Best Group Pension Provider	✓		
Best Group Protection Provider	✓		
Best Health Cash Plan Provider	✓		
Best Healthcare Service		✓	
Best Income Drawdown Provider	✓		
Best Income Protection Provider	✓		
Best Investment Bond Provider	✓		
Best Investment Fund Provider	✓		
Best Investment Service		✓	
Best Investment Trust Provider	✓		
Best Junior ISA Provider	✓		
Best Multi-Manager Provider	✓		
Best Online Service		✓	
Best Pension Service		✓	
Best Personal Pension Provider	✓		
Best Private Medical Insurance Provider	✓		
Best Protection Service		✓	
Best SSAS Provider	✓		
Best SIPP Provider	✓		
Best Stocks & Shares ISA Provider	✓		
Best Structured Products Provider	✓		
Best Structured Products Service		✓	
Best Tax and Estate Planning Solutions Provider	✓		
Best Use of Technology in the Investment Life & Pensions Sector	✓		
Best Term Assurance Provider	✓		
Best Venture Capital Trust Provider	✓		
Best Wrap/Platform	✓		
Equity Release Adviser of the Year			✓
Innovation Award	✓		
Investment Adviser of the Year			✓
Protection Adviser of the Year			✓
Retirement Adviser of the Year			✓
Service Beyond the Call of Duty		✓	
Structured Product Adviser of the Year			✓
Tax and Estate Planner of the Year			✓