

What Do Leading Advice Firms Want From Investment Partners in 2025?



Greater Strategic Control



Clear, Predictable Pricing



Robust client communications



Tailored Fit to Firm Brand & Culture



Freedom from Legacy Constraints



Deeper Partnership, Not Just Product



Alignment with Regulatory Realities



The priorities are shifting. Here's what matters most now:

1. Greater Strategic Control

They're not looking for DIY — just investment partners who collaborate, not dictate.

60% of adviser firms say they want more input into asset allocation and investment strategy.

2. Clear, Predictable Pricing

Cost transparency has become a board-level concern. With Consumer Duty in force, firms are scrutinising:

- ✓ Layered fees
- ✓ Ongoing charges
- ✓ Cost-to-value alignment

“What exactly are our clients paying for?” is no longer rhetorical.

3. Robust Client Communications

Adviser want firms that...

- ✓ Work in partnership to design processes
- ✓ Provide meaningful content such as education or thought leadership pieces
- ✓ Provide operational support

Great partnerships result in the adviser being kept free to focus on the client.

4. Tailored Fit to Firm Brand & Culture

Advisers want a Centralised Investment Proposition that reflects how they work:

- ✓ Communication tone
- ✓ Investment philosophy
- ✓ Risk attitude
- ✓ Operational structure

One-size-fits-all feels out of date. Customisation is the new competitive edge.

5. Freedom from Legacy Constraints

Firms are frustrated by:

- ✓ Rigid quarterly rebalance dates
- ✓ Pre-packaged portfolios with little flexibility

The trend? Towards agile, platform-agnostic, and unbranded solutions.

6. Deeper Partnership, Not Just Product

Top firms are re-evaluating their relationships:

- ✓ Regular access to investment managers
- ✓ Direct line to portfolio specialists
- ✓ Collaboration on client-facing materials

“We don’t just want a service — we want a team that has our back.”

7. Alignment with Regulatory Realities

Consumer Duty. Co-manufacturing. Product governance. Leading firms expect investment partners to:

- ✓ Support with compliant literature
- ✓ Ensure suitability mapping
- ✓ Share responsibility—not shift it

Compliance is now collaborative.

Is Your Investment Partner Evolving With You?

If not, it might be time to rethink what support looks like in a post-Consumer Duty world.

Speak to our team and explore how a tailored approach could support your firm’s goals in 2025.



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