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**TOM GREEN**  
Square Feet Co Work  
Northampton

# INDUSTRY GUIDE **BUSINESS & FINANCIAL ADVICE**

# Business & Financial Advice Industry Guide

This guide is designed for anyone starting or running a business related to the Business and Financial Advice Industry.

We have highlighted some of the key resources about the Business and Financial Advice Industry that you can find at the Business & IP Centre such as general research (statistics, trends and developments), key companies, trade magazines and newsletters.

All you need is a free Reader Pass.

## About the Business & IP Centre (BIPC)

The Business & IP Centre is here to help you start and grow your business. We offer one to ones, specialist workshops, inspiring events and access to premium market data and intelligence – all for free. We are home to the UK's largest collection of business and intellectual property (IP) information, as well as a thriving community of entrepreneurs. Based in the British Library and over 70 libraries across the UK.

## Here to help

If you have any questions, our information specialists at the Business & IP Centre will be happy to help. You can pop into the BIPC reading room on the first floor in the British Library, or email one of the team at [bipc@bl.uk](mailto:bipc@bl.uk)

Updated January 2024, Seema Rampersad.

[bl.uk/bipc](https://bl.uk/bipc)



linkedin



Instagram

## Start-Up Information



**The Cobra database** contains practical fact-sheets on all aspects of starting, running and managing a small business – including information on writing business plans, marketing, company structures etc.

It also covers the practical aspects of how to start and run particular types of businesses – outlining necessary skills, regulations, licences and legislation etc. and highlights other sources of information and advice available.

Accessible via electronic resources.

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## Business Opportunity Profiles (BOP)

Accountancy Practice	BOP124
Bookkeeper	BOP075
Business Adviser	BOP482
Business Trainer	BOP492
Debt Collection Agency	BOP118
Executive Coach	BOP496
Independent Financial Adviser	BOP113
Insurance Broker	BOP551
Loss Assessor	BOP559
Management Consultant	BOP442
Marketing Consultant	BOP415
PR Consultant	BOP110

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## Mini Business Opportunity Profiles (MBP)

Debt Management Firm	MBP338
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## Sector Guides (SEC)

Financial Services (Sector Update)	SEC060
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Fintech (Sector Update)	SEC080
Accountancy (Industry Snapshot)	SYN028

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## **Business Information Fact Sheets (BIF)**

Applying for Authorisation as a Financial Services Provider	BIF033
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# Market Research and Statistics

If you are planning on starting a business you will need to be aware of the latest trends, developments and opportunities within your industry which can all be found from market research.

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## eMarketer

eMarketer produces reports from high-level overviews of the trends, forces, and players affecting the industry, to product and company rankings and comparisons focused on digital consumer and retail markets.

- Fintech Trends to Watch in 2023
  - Banking Trends to Watch in 2023
  - Exploring the benefits, risks and regulatory implications of AI in insurance 2023
  - UK Mobile Payments 2022
  - UK Digital-Only Banks Report 2022
  - Spotlight: Sustainable banking, 10 February 2022
  - Payment methods and funding mechanisms, 8 February 2022
  - AI in Wealth Management, 12 January 2022
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## EMIS

EMIS is a research database covering markets research, data and news for international markets, companies, and industries.

- United Kingdom – Accountancy (Marketline)
- United Kingdom – Banks (Marketline)
- United Kingdom - Insurance Brokers (Marketline)

- Europe - Investment Banking & Brokerage (Marketline)
- United Kingdom - Management & Marketing Consultancy (MarketLine)
- United Kingdom - Retail Savings & Investments (Marketline) Similar reports, published by MarketLine, cover other countries, Europe and global financial services reports, including UK banking, credit cards and insurance markets.
- Financial Regulation – United Kingdom 2022
- 2023 Global Asset Management Performance Management
- The AI Revolution in Banking 2022
- Global Investment Banking and Brokerage 2022
- Global Banking Industry Quarter 4 Report 2022 by Acquisdata
- 2023 Banking Industry Outlook
- 2023 Banking and Capital Market Outlook
- The Impact of Fintech on Financial Services – Industry Report – February 2023
- Europe Crowd Lending and Crowd Investing Market - Growth, Trends, COVID-19 Impact, and Forecasts (2021 - 2026) (Mordor Regional Industry Reports), 31 August 2021
- Financial Services Report: United Kingdom (EIU - Industry Reports), published quarterly
- Financial Services Market Global Briefing Report by TBRC
- The Global Risks Report 2023 (Oliver Wyman - Financial Services Reports), 14 January 2022
- Global ESG Investment Industry Report September 2022 by Acquisdata
- Global Pension Funds Industry - Growth, Trends, and Forecast (2020-2025) (Mordor Global Industry Reports), 9 December 2020
- Global Investment Banking Trading Services Market, 2020-2027 (Allied Market Global Research), 28 February 2021
- Wealth Management Market Global Briefing 2022 Including: Portfolio Management and Investment Advice; Funds, Trusts, And Other Financial Vehicles (TBRC - Global Industry Briefings), 3 May 2022

Similar reports, published by a range of research organisations, cover other countries, Europe and global financial services reports, including payments, digital banking and consumer credit



**WHERE KNOWLEDGE IS POWER**

Market research also covers market size and forecasts, consumer demographics and attitudes, the key players and products and will often include SWOT and PEST analysis showing areas of strength, weakness, opportunities etc. IBIS World provides trusted industry research on thousands of industries worldwide. Their analysts leverage economic, demographic and market data, then add analytical and forward-looking insight, to help organizations of all types make better decisions.

- Accounting & Auditing in the UK
- Bookkeeping in the UK
- Financial Management in the UK
- Financial Technology in the UK
- Insurance Agents & Brokers in the UK
- Management Consultants in the UK
- Public Relations & Communication Activities in the UK
- Tax Consultants in the UK
- 28 reports on Financial and Insurance Activities



## Mintel

Mintel provides market research and consumer intelligence solutions to consumer-focused businesses with a combination of syndicated tools and custom insight solutions.

- Accounting and Financial Management
- B2B Economic Outlook
- B2B Insurance
- B2B Property and Motor Insurance
- Bridging Loans
- Car Finance

- Commercial Banking and Finance
- Commercial Borrowing
- Commercial Mortgages
- Consumer Attitudes towards Debt and Credit
- Consumer Payment Preferences
- Consumers and Investing
- Consumers and the Economic Outlook
- Credit Cards
- Current Accounts
- Equity Release Schemes
- Fraud and Security in Financial Services
- Financial Lifestages and Financial Priorities
- Financial Services and the Metaverse
- Financial Services Disruptors
- Green, Ethical and Socially Responsible Finance
- Home Insurance
- Peer to Peer Business Finance
- Personal Pensions
- Pet Insurance
- Retail Payment Options
- Retirement Planning
- Small Business Overview



## **Passport Euromonitor International**

- Business Dynamics: The United Kingdom
- Similar reports and statistics, published by Euromonitor International, cover other countries and the global market

- United Kingdom reports on Financial Cards and Payments, Consumer Lending and Consumer Credit
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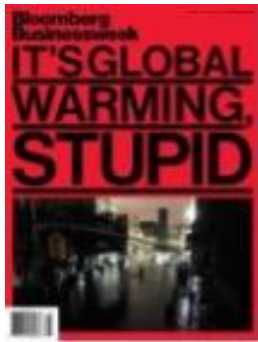
Please note that many articles about the business and financial advice industry (from business journals and newspapers) are available from our electronic sources: Factiva, Business Source Complete (EBSCO), EMIS.

Also, contact details and individual reports of companies in the business & financial advice industry are available from our electronic sources: Fame, Orbis, Market IQ.

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# Trade Magazines and Journals

Useful for gaining inside knowledge, recent trends, industry news, company profiles, reviews of new products and services. Some contain annual reviews and company contact lists. Ordered via Explore the British Library (please ask for help).



## **Business Week (McGraw-Hill)**

[(P) AL 011 –E (4)]

In-depth coverage of the latest trends in technology, finance and management; offering insight and analysis on global business.

[bloomberg.com/businessweek](http://bloomberg.com/businessweek)



## **Financial Times (London: Financial Times Ltd)**

[NEWS.REG191]

The latest UK and international business, finance, economic and political news, comment and analysis.

[ft.com](http://ft.com)



## **Financial News (London: eFinancialNews Limited)**

[REG2130]

The latest UK and international business, finance, economic and political news, comment and analysis

[fnlondon.com](http://fnlondon.com)



## **Harvard Business Review (Harvard University)**

[(P) AQ 00 -E(16)]

Brings its readers original research and first-hand perspectives from leading business thinkers around the world.

[hbr.org](http://hbr.org)



**Money Management  
(FT Finance)**

[(P) AM 02 -E(6)]

The professional's independent adviser, including renowned fund statistics, unique surveys and more.

[ftadviser.com/brand/money-management](http://ftadviser.com/brand/money-management)



**The Banker  
(London Financial Times Ltd)**

[(P) AL 37 -E(1)]

The Banker's primary focus is global financial comment and insight, featuring opinion pieces, profiles and interviews with leading banking and finance figures.

[thebanker.com](http://thebanker.com)

# Business News and Journals

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## **Factiva**

In order to find the latest news on your topic it is always worth searching Factiva, Business Source Complete and EMIS.

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## **Business Source Complete**

You will find articles from specialist business and academic journals, as well as newspapers and magazines. You may also find market research reports and case studies. As well as profiles of leading industry figures.

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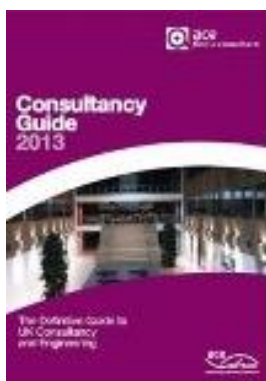
## **EMIS**

You will also find articles covering recent developments and predicting future trends in your industry.

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# Directories

Contain lists of companies and industry contacts. Some have annual industry reviews, and specialist articles.



## **Consultancy guide: the definitive guide to UK professional consultancy and engineering (Association for Consultancy and Engineering, 2013)**

[(B) DIR 658.4602541 BUS]

Member listings and profiles, affiliated profiles, member geographical listings and consultancy classification tables.



## **Consultants and consulting organizations directory**

(Gale Research Co., 2023)

[(B) DIR 658.46 BUS]

A reference guide to nearly 28,000 firms and individuals engaged in consultancy for business, industry and government, and operate in the U.S. and Canada



## **Plunkett's green technology industry almanac 2022: green technology industry market research, statistics, trends and leading companies**

(Brown Books 2022)

[(B) DIR 338.927 Business]

# Internet Sources

Websites containing free sources of policy, industry statistics, information and contacts.

## **Association of British Mentors (ABM)**

The trade body for business mentors and business mentoring in the UK and Ireland.

[associationofbusinessmentors.org](http://associationofbusinessmentors.org)

## **Association of Chartered Certified Accountants (ACCA)**

The global body for professional accountants, with centres across the United Kingdom.

[accaglobal.com](http://accaglobal.com)

## **Association of Professional Financial Advisers (APFA)**

Represents professional financial advisers; membership benefits include a listing on the APFA's searchable database, access to training and guidance on regulatory compliance.

[en.wikipedia.org/wiki/Association\\_of\\_Professional\\_Financial\\_Advisers](http://en.wikipedia.org/wiki/Association_of_Professional_Financial_Advisers)

## **Association of Independent Professionals and the Self Employed (IPSE)**

The largest association of independent professionals in the EU, representing freelancers, contractors and consultants from every sector of the economy.

[ipse.co.uk](http://ipse.co.uk)

## **British Insurance Brokers' Association (BIBA)**

A leading professional organisation representing brokers in the UK.

[biba.org.uk](http://biba.org.uk)

## **British Private Equity & Venture Capital Association**

UK professional body for equity and VC professionals, whose website includes research and reports on the sector

[bvca.co.uk](http://bvca.co.uk)

## **Chartered Accountants Ireland**

A membership body in Ireland representing 23,000 influential members throughout the globe, with the role to educate, represent and support its members.

[charteredaccountants.ie](http://charteredaccountants.ie)

### **Chartered Institute for Securities & Investment**

UK membership body for professionals in the securities, investment, wealth and financial planning sectors

**[cisi.org](http://cisi.org)**

### **Chartered Insurance Institute (CII)**

The national body representing the insurance industry in the UK, with a separate faculty for insurance broking.

**[cii.co.uk](http://cii.co.uk)**

### **European Federation of Management Consultancies Associations (FEACO)**

Assists in the promotion and development of the profession of Management Consultancy in Europe, providing support to its constituent National Association membership, including 14 national member associations.

**[feaco.org](http://feaco.org)**

### **Financial Conduct Authority (FCA)**

A UK financial regulatory body, operating independently of the UK government and financed by charging fees to members of the financial services industry.

**[fca.org.uk](http://fca.org.uk)**

### **Institute of Chartered Accountants in England and Wales (ICAEW)**

A world leading professional membership organisation that promotes, develops and supports over 144,000 chartered accountants worldwide.

**[icaew.com](http://icaew.com)**

### **Institute of Chartered Accountants of Scotland (ICAS)**

The professional body for more than 20,000 world class business men and women who work in the UK and in more than 100 countries around the world.

**[icas.com](http://icas.com)**

### **Institute of Consulting**

An organisation within the Chartered Management Institute (chartered professional body, dedicated to management and leadership) with a core focus towards consulting professionals.

**[iconsulting.org.uk](http://iconsulting.org.uk)**

### **International Council of Management Consulting Institutes (ICMCI)**

An international membership organisation and network of the management advisory and consultancy associations and institutes worldwide.

[cmc-global.org](http://cmc-global.org)

### **Institute of Directors (IoD)**

Membership to IoD has access to a range of resources - including access to business information, training, professional expertise, networking opportunities and flexible working spaces - all of which are designed to help you strengthen and build on your own success.

[iod.com](http://iod.com)

### **Institute of Financial Accountants**

UK professional membership organisation for accountants; part of the IPA, the world's largest SME- focused accountancy group

[ifa.org.uk](http://ifa.org.uk)

### **London Stock Exchange Group**

Access to world financial markets, data and resources, new and statistics.

[lseg.com/resources](http://lseg.com/resources)

### **Management Consultancies Association (MCA)**

Represents management consultancy firms in the UK; its members comprise around 60% of the UK consulting industry, employ around 30,000 consultants and work with over 90 of the top FTSE 100 companies and almost all parts of the public sector.

[mca.org.uk](http://mca.org.uk)

### **Office for National Statistics (ONS) – Businesses**

Provides UK business-related statistics, including business demographics; activity, size and location, research and development.

[ons.gov.uk/businessindustryandtrade/business](http://ons.gov.uk/businessindustryandtrade/business)

### **Office for National Statistics (ONS) – Business services**

Provides UK statistics for business services, including summaries, publications and data tables.

[ons.gov.uk/businessindustryandtrade/business/businessservices](http://ons.gov.uk/businessindustryandtrade/business/businessservices)

### **Payment Systems Regulator**

UK regulator of payment systems operators, infrastructure and payment service providers

[psr.org.uk](http://psr.org.uk)

### **Personal Finance Society (PFS)**

Represents financial planning professionals; sub-group of the Chartered Insurance Institute (CII), a professional association for the insurance and financial industry.

[thepfs.org](http://thepfs.org)

### **Personal Investment Management and Financial Advice Association (PIMFA)**

Association of firms that provide wealth management and financial advice to everyone from individuals and families to charities, pension funds, trusts and companies.

[pimfa.co.uk](http://pimfa.co.uk)

### **Prudential Regulation Authority (PRA)**

Supervisory authority for banks, building societies, credit unions and insurance companies

[bankofengland.co.uk/prudential-regulation](http://bankofengland.co.uk/prudential-regulation)

### **Small Business Federation**

Offers members a wide range of vital business services including advice, financial expertise, support and a powerful voice heard in government. Their mission is to help smaller businesses achieve their ambitions

[fsb.org.uk/about-us.html](http://fsb.org.uk/about-us.html)

# Disclaimer

Please note that every effort has been taken to ensure the accuracy of the information contained in this document, however some recently acquired items may since have been added to the collection. Please ask for help at the enquiry desk or check the online catalogue "Explore the British Library" [explore.bl.uk](https://explore.bl.uk) for more details.

**The Business & IP Centre** is here to help you start and grow your business. We offer one-to-ones, specialist workshops, inspiring events and access to premium market data and intelligence - all for free. We are home to the UK's largest collection of business and intellectual property (IP) information, as well as a thriving community of entrepreneurs. Based in the British Library and over 70 libraries across the UK. Visit the Business & IP Centre or [bl.uk/bipc](https://bl.uk/bipc) to find out more.