

Woven launches revenue projection tool to put growth planning in advice firm owners' hands

- Models firm-level revenue and EBITDA using live practice data
- Helps owners visualise the impact of firm-level changes such as average client size, onboarding rates, and cost structure

Woven Advice, the data specialist, has unveiled a new revenue projection tool designed to help advice firm owners – and potential buyers – model growth and evidence value. Part of Woven's insight analytics suite, the revenue projection tool addresses two critical needs: modelling firm valuations in an active consolidation environment and supporting advisers in their organic growth plans.

Using live practice management data, firms can adjust variables like average client size and new client onboarding to instantly see the impact on revenue and EBITDA (earnings before interest, taxes, depreciation, and amortisation). Other factors, including AUM and operating costs, are also modelled to display different scenarios.

As the UK advice market dynamics evolve, acquisition patterns are shifting. Research from NextWealth reports that 11 new buyers entered the market last year, while 21 previously active acquirers sat on the sidelines. This indicates a continuing appetite to acquire, but with greater selectivity as buyers seek potential for organic growth as a marker of value.

Nicky Sevel, CEO and co-founder of Woven Advice, says, "We exist to give advice firms clarity so that they can make better decisions – and the revenue projection feature is about giving business owners the insight they need to make those strategic decisions – whether that be positioning your firm for sale or building towards future growth. The ability to take integrated data from multiple sources, track and model various scenarios to evidence your trajectory is absolutely critical."

Andrew Elson, managing director of advice firm Berry & Oak, whose feedback led to the development of the tool, adds, "It's rare to see feedback turn so quickly into such a powerful solution - and Woven have achieved exactly that. I'm used to tools that model client data, but this one models the advice firm itself. For my business, we can now live-track using integrated data, taking our modelling far beyond spreadsheets and making it more usable, reliable and secure."

Merger and acquisition specialist, Martyn Laverick of Catalyst Partners, comments, "Data quality and growth potential are make-or-break in the current market. Whether you're showing buyers your value and potential value, or rallying your team around a growth plan, this tool gives you a crystal-clear picture of what's possible. With 20% of

firms gearing up to exit, firms that can show robust forecasts are the ones commanding attention and premium valuations.”

Woven is offering business owners a demonstration of its revenue projection tool on Friday, 5 September: <https://app.livestorm.co/woven-advice/smarter-data-faster-decisions?s=68735aaf-7ec2-4b7e-b9ff-9e6a5352442d>

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About Woven Advice

At Woven Advice, we’re transforming data management for wealth management firms - freeing business owners and financial planners to focus on what they do best: advising clients. Manual processes like re-keying data, collecting valuations and producing reports waste valuable time and hinder growth.

We believe AI and automation are the future of professional services, and wealth management has the ideal framework to harness these innovations. Yet data remains the biggest challenge.

Our solutions help firms streamline and consolidate their data, improving efficiency, profitability and compliance. With Woven Advice, business owners and planners can transition to a more productive, technology-driven future - where client service is elevated, and business growth is seamless.

White paper: <https://wovenadvice.com/platform-switching-whitepaper>

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