Press information

25th January 2012

Enhancements increase nimbleness of Nucleus platform

Nucleus, the IFA-owned and controlled wrap platform, has added further enhancements to its proposition to make it even easier for IFAs to manage and maintain their clients' accounts.

The enhancements are part of Nucleus' ongoing development cycle and have been designed and implemented in conjunction with the platform's member IFAs.

The new enhancements include:

- Online cash withdrawal function for General and Isa accounts
- Instant online processing of client contact details
- Enhanced Capital Gains calculator
- Straightforward grouping of alerts and event history

Commenting on the enhancements, Nucleus chief operating officer Andrew Smith said: "By working closely with member firms, we are able to fully understand and appreciate what sort of enhancements mean the most to them and their clients and how best to implement them. These latest tweaks are a result of that relationship and are part of our ongoing initiative to make the platform as easy, efficient and intuitive as possible for our users."

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Notes to editors:

Full list of platform enhancements and benefits

Platform feature	Nucleus enhancements	Benefit to adviser
Instant online processing of changes to client contact details	• Advisers can now change clients' addresses online in an instant. • Advisers can also now change clients' email addresses immediately online.	Previously, changing addresses was a manual process with a turnaround time of three days. Now when an address is changed on the platform it is updated immediately.
Ability to create cash withdrawals from General and Isa accounts immediately online	• Ability to create a withdrawal from a client's available cash in their General and Isa accounts.	Now, when the adviser requests a withdrawal on the platform it is processed immediately. Depending on when the withdrawal is requested the actual payment to the client will be made today or the following day.
Enhanced Capital Gains calculator improved to include adviser fee	• Adviser fee is now included in the acquisition cost	Improved accuracy in capital gains reporting.
Straightforward grouping of alerts and event history	• Alert types and events are now divided into categories making it easier to find the alert or events advisers need.	The performance of alerts and event history has now been improved for users.

About Nucleus

Nucleus Financial Group is an online wrap based business platform.

Nucleus was founded in 2006 by a number of high quality IFAs who shared a commitment to create a market where advisors have the infrastructure and desire to place the client centre stage.

Since foundation Nucleus has established itself as a major force for change in the market. It is now a community of IFA businesses who through ownership and control of the business process seek to create a better customer experience.

The management team is led by David Ferguson chief executive, and offers extensive experience across all areas of the UK retail financial services market.

In 2011, Nucleus' IFA-firm total reached 95 and the platform also broke the £3bn AUM barrier.