

# Press information

**15 September 2010**

## **Nucleus hosts first investment academy**

Nucleus, the IFA-owned and controlled wrap platform, is hosting its first investment academy aiming to improve delegates' knowledge on technical investment areas such as structured products and hedge funds.

Arranged by the Nucleus investment strategy team, the first academy takes place on Thursday 16 September and will include four workshops helping delegates better understand commodities, structured products, hedge funds and fund research. Delegates will also hear a speech from guest speaker Justin Urquhart Stewart, from Seven Investment Management, and a welcome address from Kenny McKenzie, managing director, Intelligent Capital and chairman of the Nucleus investment strategy team.

Commenting, McKenzie says:

“There are a number of issues for IFAs to consider at present: RDR requires that IFA firms have a robust investment process; trail based valuations need the business to demonstrate a strong service proposition to support trail earnings; and the increasing choice of assets means the information inflow can be overwhelming. Regardless of the investment solution adopted by an IFA firm, it remains important to have an understanding of the options available in the marketplace. By offering an educational day for Nucleus IFA firms, we will be assisting IFAs with these issues.”

-Ends-

**For further information please visit [www.nucleusfinancial.com](http://www.nucleusfinancial.com) or contact:**

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**Notes to editors:**

### **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.

The company was rewarded for its ground-breaking approach at the Scottish Financial Enterprise (SFE) Innovators Awards held in Edinburgh on 29 November 2007.

Nucleus Financial was rewarded for bringing something new to the wrap platform sector and won best new platform at the 2008 Adnitor Awards in October.

Nucleus won the 'Best online wrap or fund supermarket' accolade at the 2008 Online Finance awards in November, 2008.