

Press information

07 December 2010

Nucleus adds two more firms

Nucleus Financial, the IFA-owned and controlled wrap platform, has signed up two more IFA firms.

Luton-based Wealth Matters is a fee-based practice of boutique financial strategists. Currently with five advisers, the business is looking to expand its operations over the next five years via a combination of organic growth and acquisition of other client banks.

Pennine Financial Planning, which is based in Sheffield, is a fee-only investment adviser. It takes a holistic view to the planning process to achieve a balanced and integrated plan.

Barry Neilson, business development director at Nucleus, says: "We continue to see an overwhelming level of interest from IFAs across the country and this is evidenced by our two new member firms. We now have over 80 firms, which is something the team should be very proud of."

Julian Gilbert, director, Wealth Matters, says: "We consider ourselves a very progressive firm and have already had many dealings in the platform industry so it was important for us to find a platform that stood out among the others. Nucleus has similar values to us and we are very excited to be joining their IFA community."

-Ends-

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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.