

Press information

26 April 2012

Nucleus enhancements grant advisers greater control

Nucleus, the IFA-owned and controlled wrap platform, has further enhanced the platform technology to give advisers improved access and control of their clients' accounts.

The latest enhancements are part of Nucleus' ongoing platform development cycle and have been developed in conjunction with those who use the wrap.

The new enhancements include:

- Updates to the Nucleus adviser self service facility, allowing advisers to make quick and easy changes to regular payments and withdrawals
- A new Management Information tool, enabling advisers to view more information, in a simple summary format, for better reporting of platform usage across the firm

Commenting on the recent enhancements, Mark Reeve, financial adviser and member of the Nucleus platform development group said: "These latest changes once again confirm the Nucleus ethos: developing a truly transparent platform proposition that gives advisers the access and control they need to create superior outcomes for their clients. Simple administration and easy access to relevant information, in my opinion, are the key reasons for using a wrap platform and these latest enhancements are all about doing just that."

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Notes to editors:

Full list of new platform enhancements and benefits

Platform feature	Nucleus enhancements	Benefit to adviser
IFA self service	Enhancements to payments, withdrawals and direct debit functionality Amounts, frequency and dates of regular payments and withdrawals can be changed online	<ul style="list-style-type: none">• More control for users• Ability to make changes more quickly• Enhanced feature
Management information tool	A new set of MI screens that allows advisers to see summary AUA investment information as well as	<ul style="list-style-type: none">• More information• Better ability to manage client accounts

	Top 10 clients, Top 10 assets, Top 10 model portfolios and Account types by AUA across their book of business.	
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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.

On 3rd February 2012, Nucleus announced it broke the £3.5bn AUA barrier and its IFA-firm total reached 100.

<http://www.nucleusfinancial.com/>