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# Press information

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## Industry thought leaders gather for Nucleus' eighth annual strategy conference

Nucleus, the adviser built wrap, is preparing to host its eighth annual strategy conference this week, on Thursday 5 March, at The Belfry in the Midlands.

With over 250 delegates, of which 210 are advisers from thriving businesses, expected to attend, the event will be the biggest gathering of the Nucleus community yet and will feature compelling presentations from the industry's leading experts in addition to offering an insight into Nucleus' strategic roadmap for 2015.

With great financial advice never having been in greater demand and with serious opportunities available for the industry, including the reforms in the retirement market, speakers at the conference include Merryn Somerset-Webb, editor-in-chief of MoneyWeek, financial consultant Ned Cazalet, Tony Wickenden, Brett Davidson, Michael Kitces and Richard Willets, recognised as one of the UK's leading longevity experts, who will address delegates on the importance of longevity in financial planning.

He says: "The single biggest challenge facing the pensions industry at the moment is, 'how do we get it right on 7 April and beyond?' and understanding longevity is part of this equation. I am delighted that Nucleus has identified the challenge and asked me to provide some insight into this complex issue."

Tony Wickenden, founder of Technical Connection, will be sharing his reasons to be cheerful about the forthcoming retirement reforms with the adviser audience.

He comments: "We all know that 'retirement ain't what it used to be'. So nor should retirement planning be what it used to be either. I'll be looking at why that's great news for the advice industry."

Chief executive of consultants FP Advance, Brett Davidson, will present at the conference mapping out what good business performance looks like and how advisers can make it a reality in their businesses.

He says: "Managing an advisory business is something that gets thrust onto most adviser owners - it wasn't their ambition when setting up. Some grasp the nettle while others struggle to get to grips with the skills necessary to make the business work."

He adds: "I'm really looking forward to the Nucleus event. When you get that many great advisers and thought leaders in a room, amazing stuff happens."

Respected US financial planner Michael Kitces will conclude the key presentations with an inspiring talk on the future of financial planning in the digital age.

He says: "In the coming decade, the ever-expanding amount of information we have at our fingertips, through devices like smartphones, will force advisers to shift from being a dispenser of expert information and to instead become a guide, a navigator, a co-pilot with a client on their financial journey."

Commenting on the forthcoming Nucleus annual strategy conference, Barry Neilson, business development director at Nucleus, says:

"With significant corporate and technology change facing a number of platforms, it's more important than ever that advisers understand the progress being made by their chosen platform.

"Collaboration with our users has been the key catalyst for the growth Nucleus has achieved and we remain committed to helping our users continue to thrive and take advantage of the significant opportunities being created by the imminent retirement reforms."

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### About Nucleus

Nucleus is a wrap platform founded in 2006 by advisers committed to altering the balance of power in the industry by putting the client centre stage.

Since then, Nucleus has established itself as a major force for change. It is now one of the UK's fastest growing platforms and the meeting point for more than 400 adviser firms seeking to create better customer outcomes.

As at 28 December 2014, assets under administration on the platform were £8bn.

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