

Insider

August 2017

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Fergus Lyons
Managing Director

I've always believed it's essential to maintain strong lines of communication with the advisers who use AJ Bell Investcentre - both in terms of listening to their feedback, and also keeping them informed of any developments that they should be aware of. That's why I started sending out Insider every month, and it's also why we spend so much time organising events and getting out there to meet people face-to-face.

Our annual adviser survey and initiatives like the AJ Bell FIT awards are two ways that you can share your views with us right now, and in the coming weeks you will also get the chance to hear from some of our own experts and other respected names in the industry at our events. I would urge you to take advantage of these opportunities; you'll find more details about all of them in this month's Insider.

AJ Bell On the Road

I am pleased to announce that this September we will be embarking on another AJ Bell On the Road tour, taking in Glasgow, Manchester, Leeds, Birmingham, London and Bristol.

“ ... our new Technical Resources Director, Peter Hopkins, will be available after every session to answer any technical questions and discuss any client-specific scenarios you may have. ”

If you can join us at one of the seminars you'll get to hear some great investment-related content from our Head of Fund Selection, Ryan Hughes, and also our Investment Director, Russ Mould. Ryan will be looking at the different approaches to fund research and selection with a view to understanding whether psychology plays a part in investment decision making, or if a scientific approach should be the more dominant driver. Russ will be giving his take on what the markets might have in store for the rest of this year and into the next.

Sharing their insights from a technical perspective will be our Technical Resources Consultant, Lisa Webster, and our Head of Platform Technical, Mike Morrison. Lisa will look at a number of lifetime allowance-related matters, such as decisions around stopping funding and whether to draw income. She will also take a look at the taxation of flexible pension payments, and how payments can be efficiently managed. Mike will look specifically at the 'Retirement Outcomes Review', before exploring a few interesting scenarios around defined benefit transfers.

As a special bonus, our new Technical Resources Director, Peter Hopkins, will be available after every session to answer any technical questions and discuss any client-specific scenarios you may have.

You can find much more information about each seminar at www.investcentre.co.uk/ontheroad. If you are interested, I'd advise you to reserve a seat now because spaces are limited and demand will be high.

Managed Portfolio Service – one year on

Believe it or not, a year has already passed since we launched our Managed Portfolio Service. The MPS was seen as a logical extension to AJ Bell Investcentre's platform services when we launched it, and we've been delighted with how well it has been received. The service uses a range of risk-targeted model portfolios to provide a complete investment management solution for advisers and their clients.

The MPS is designed to help you select the most appropriate portfolio for each client's needs. We do this by providing a range of competitively priced, risk-targeted portfolios that are mapped to market-leading risk profiling tools. We research, build and maintain the portfolios, then use AJ Bell Investments' discretionary permissions to manage them on your behalf - leaving you free to focus on adding value for your clients through the financial planning process.

More information on our Managed Portfolio Service can be found here: www.investcentre.co.uk/managed-portfolio-service

AJ Bell Passive funds

It would be remiss of me to mention the MPS and not also highlight the AJ Bell Passive funds. Following on from the MPS launch, we extended our range of multi-asset investment solutions in March by offering a choice of five AJ Bell Passive funds.

Adopting the same methodology developed in the MPS but delivered in the form of Open-Ended Investment Company (OEIC) units and focusing on passive investment strategies, these funds offer a simple, transparent, low-cost approach to investing.

Key benefits:

- Actively targeting risk to avoid unnecessary surprises
- Long-term asset allocation approach to filter out short-term noise
- Diversification through a global multi-asset approach

- A focus on passive investments, keeping costs low and with the annual charge capped at 0.5% (OCF)
- The Funds & Shares Service custody charge will be waived on investments in the funds until January 2019

More information on these funds can be found here: www.investcentre.co.uk/ajbell-passive-funds

Adviser survey

First of all, I'd like to thank those of you who have already completed our adviser survey. If you haven't had chance to do so yet, there is still time before the survey closes on 29 September 2017.

This survey is the best way we have of ensuring that our platform continues to meet your needs now and into the future, so it's vital that we hear from as many of you as possible.

It doesn't take very long to complete the survey, and you could be rewarded with a case of wine in our free prize draw on 3 October 2017. Thanks in advance for your help.

Survey: [AJ Bell Investcentre adviser survey](#).

AJ Bell Investival

AJ Bell Investival returns on 9 November and this year we have gone for a jazz and blues theme. As ever, you can expect an outstanding line-up of speakers, including Andy Bell, Edward Bonham Carter, Neil Woodford, Mark Barnett, Russ Mould and many more.

“ Over half of the available seats have already been taken, so to avoid disappointment you should reserve your free ticket now. ”

Following the main event, our after-show party will get underway with live music in the Royal Institute of British Architects' stunning Florence hall, and there will also be a Q&A session with a sporting legend too.

Over half of the available seats have already been taken, so to avoid disappointment you should reserve your free ticket now. Full details on the line-up and agenda are available at www.investcentre.co.uk/Investival where you can also take our AJ Bell Passive funds quiz and find out your attitude to risk – and swimwear ...

Monthly service performance

To give you a flavour of our service delivery and how we are performing, our typical turnaround times for a number of key service areas are outlined below. We will update this in each issue and flag any hotspots which may occur, particularly in the lead-up to peak periods.

The information below is not provided as a formal measure of our service levels, but rather to give you a general flavour of how our Customer Services Team is currently performing. Looking across all of the areas listed below, we are hitting the indicative timescales provided in 87% of cases.



Key contacts

Adviser Support Team

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Business Development Team

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