

# Insider

November 2017

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Fergus Lyons  
Managing Director

All other events here at AJ Bell have been overshadowed by the terrible news that our friend and colleague Mike Morrison passed away at the start of November. Mike was extremely popular and well-respected not just within our company, but also throughout the wider industry, and his loss will be keenly felt by all who knew him.

## AJ Bell Investival 2017

Thank you to those who joined us for AJ Bell Investival 2017. As each year passes the event grows and strengthens, and we are proud to host what we believe is one of the best investment conferences on the circuit. As usual, we will shortly be circulating a number of short Q&A videos that we filmed with the speakers on the day.

Next year we are intending to put on an even bigger event, possibly with a slightly different format for the day. We are working through your feedback to build on this year's success, and would be delighted to [hear from you](#) with any other suggestions on how we could enhance the current format.

“ ... we are offering  
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Anyone who attended this year will have seen that we had a full house. With this in mind, we are offering [priority registration](#) for AJ Bell Investival 2018. If you provide us with a few details we'll secure your seat and confirm when the date has been set for you to officially sign up. I hope to see you next year.

## Welcome aboard, Kevin and Matthew

We have recently appointed two key new members to our AJ Bell Investments team, with Kevin Doran joining us as Chief Investment Officer and Managing Director, and Matthew Brennan taking on the role of Fund Manager.

Kevin will be responsible for leading the AJ Bell Investments team and developing the range of investment solutions it offers to financial advisers and customers. This range currently comprises a Managed Portfolio Service (MPS) and our five risk-rated passive funds.

Kevin was previously Chief Investment Officer at Brown Shipley, where he took overall responsibility for their investment proposition, incorporating investment strategy and portfolio implementation. He then took on the role of Group Head of Research and Strategy at Brown Shipley's parent company, KBL European Private Bankers, where he was responsible for the investment strategy of its European private banking network.

Matthew Brennan will be part of the team responsible for the day-to-day running of the AJ Bell Passive funds, and will work with Kevin to further grow the range of investment options AJ Bell provides.

Matthew previously worked with Kevin at Brown Shipley Private Bank, where he was Senior Fund Manager and Head of Fixed Income Research, with specific responsibility for managing its discretionary fixed income fund.

I am very pleased to welcome both Kevin and Matthew to the team, and I look forward to seeing the positive impact they are sure to have on AJ Bell Investments.

## AJ Bell Passive funds and MPS quarterly reports

We have now released both our [MPS quarterly report](#) and our [Passive funds range quarterly report](#). If you have clients who use either of these services, please feel free to pass the reports on to them.

With significant macro-economic tensions around the world, volatile currency markets and potential interest rate increases, it would be logical to think the global economy was struggling. But robust performance from many parts of the world helped equity markets hit record highs during the third quarter of 2017. These reports take a look back at the major events of the quarter and examine the major drivers of performance.

If you are not yet using our [MPS](#) or the [AJ Bell Passive funds](#), you might want to consider them as a cost-effective solution for some of your clients. Our intention when launching them was to help advisers significantly reduce the hassle and regulatory burden associated with managing their clients' investments.

Both the Passive funds and MPS are managed by our highly experienced investment team, which uses a long-term, multi-asset allocation approach to filter out short-term noise and achieve real diversification. In order to keep costs low, the focus is always on passive investments.

**The value of investments can go down as well as up and your client may not get back their original investment.**

For details of the investment philosophy and the team behind the AJ Bell Passive funds, take a look at our new [AJ Bell Passive funds due diligence FAQ](#) document. You will find this in our [Due Diligence Hub](#).

## FinalytiQ's 2017 Advised Platform Report

You will be glad to hear that FinalytiQ has agreed to let our registered advisers download its 2017 Advised Platform Report free of charge.

To access the report, just [log in](#) to [Investcentre.co.uk](#) and visit the Due Diligence Hub. I'm sure you will find the report useful.

“ ... FinalytiQ has agreed to let our registered advisers download its 2017 Advised Platform Report free of charge. ”

## Ryan Hughes' webinar

Ryan Hughes, our Head of Fund Selection at AJ Bell Investments, has asked me to extend you an invitation to his upcoming webinar, entitled 'Selecting fund managers - art or science?'

During the session Ryan will set out the key information you need to consider when selecting fund managers. He will also take a look at some different approaches to research, and consider the importance of issues like investor psychology.

The webinar will take place on 7 December at 10am and will count as 30 minutes of CPD time. If you would like to take part, please [register here](#).

## Back office - Intelliflo

Just a quick note to let you know that all of the transactions available on the AJ Bell Investcentre platform can now be used within Intelligent Office - whether that be for client management, reporting purposes, or for use in conjunction with other Intelligent Office integrations.

Investment and cash transactions are provided on a daily basis for all accounts on the AJ Bell Investcentre platform.

“ ... all of the transactions available on the AJ Bell Investcentre platform can now be used within Intelligent Office ”

This development delivers significant time savings and improvements in efficiency, because it allows all client data to be held in one place and means you no longer have to manually download information.

## 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 89% of cases.



## Key contacts

Adviser Support Team

☎ 0345 83 99 060

✉ [enquiry@investcentre.co.uk](mailto:enquiry@investcentre.co.uk)

Business Development Team

☎ 0345 40 89 100