

Insider

June 2018

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Fergus Lyons
Managing Director

As if World Cup fever and the pros and cons of VAR aren't exciting enough, you've now got the latest issue of Insider to enjoy too! While I realise most of you probably won't find my monthly update quite as enthralling as Russia's festival of football and the whole 'Was it a penalty or not?' debate, there are certainly some interesting items in here that you need to know about. And once you've had a read, you can easily get your next footy fix by entering our #AJBellKeepyCup competition on @ajbellgroup social media. Whoever does the most keepy ups in one minute will win two VIP England tickets at Wembley and a World Cup 2018 competition ball.

EValue and Defaqto risk ratings

I am delighted to announce that we have now mapped the AJ Bell Managed Portfolio Service (MPS) and our range of Passive funds to EValue and Defaqto risk ratings. They were already mapped to Dynamic Planner and Finametrica, so you now have a truly comprehensive selection of risk ratings to choose from when matching our range of investment solutions to your clients' risk appetites.

“...we have now mapped the AJ Bell Managed Portfolio Service (MPS) and our range of Passive funds to EValue and Defaqto risk ratings.”

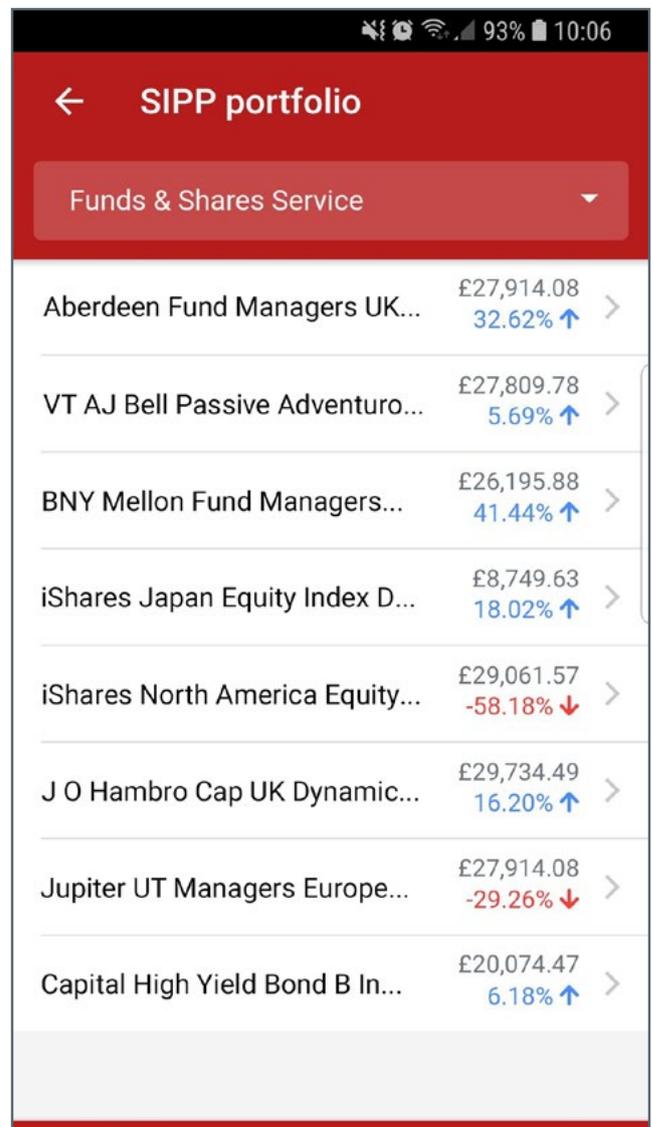
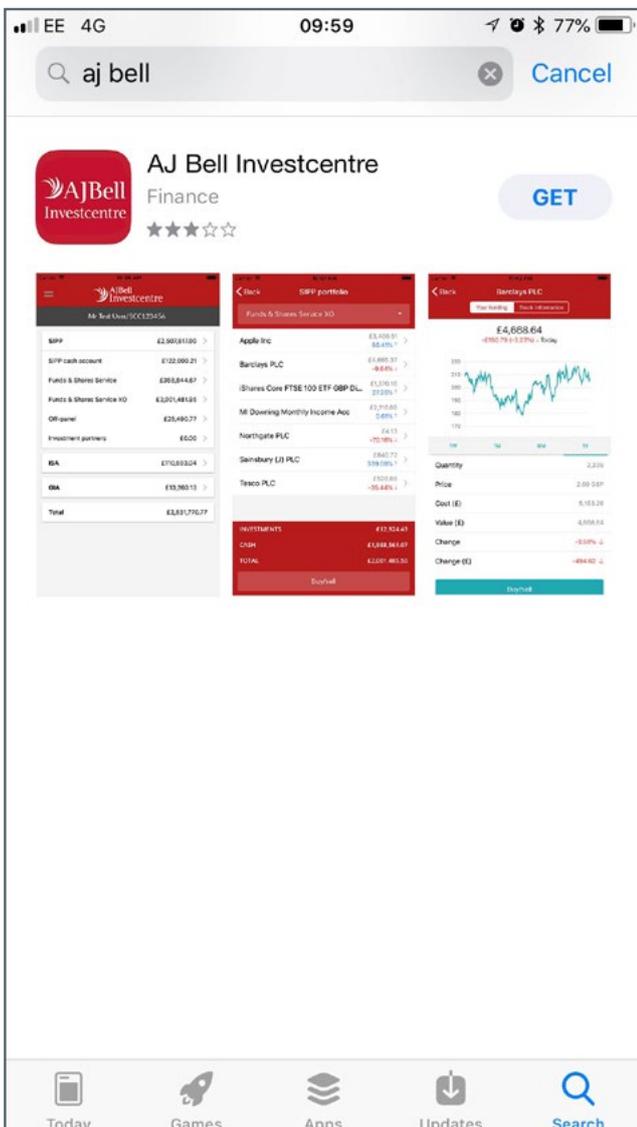
For more information on this please read our [risk profiling tools guide](#).

New client app

Our new AJ Bell Investcentre client app is now available to download free of charge on IOS and Android devices - just search for 'AJ Bell' or 'AJ Bell Investcentre' in the IOS or Android app store.

Once a client has the app they can easily access their AJ Bell Investcentre account on the move and check the current value of their portfolios. They can also access information on their underlying investments in the Funds & Shares Service, read any secure messages and view their cash statement or transaction history. If you have set up an F&SS XO account for your client, they can also trade in shares, funds, ETFs, bonds and more via the app too.

In case you're worried about security, don't be - 256 bit SSL encryption means the app has the same high level of protection that your clients get when they log in to the dealing site from a PC.



Awards season

We are well and truly in the midst of awards season and it was great to see us announced as winners of the 'Best Pension Provider' category in the Money Marketing Awards, and 'Best Full SIPP' in the Professional Paraplanner Awards.

Each year Paraplanners nominate the products and service providers they feel are the best in the market, so I'd like to thank all those of you who put us forward for that one.

“...it was great to see us announced as winners of the 'Best Pension Provider' category in the Money Marketing Awards, and 'Best Full SIPP' in the Professional Paraplanner Awards.”

Winning the Money Marketing Award was also a fantastic result and a reflection of the hard work and focus on great service that I see day after day within our business.

Two other big awards are coming up soon that require the views and input of advisers. We really appreciate every vote but also never rest on our laurels. If you have a few spare minutes I would urge you to share your views with the UK Platform Awards <https://www.surveymonkey.co.uk/r/ukpa2018> and the Financial Service Awards <https://study.coredataresearch.com/index.php/167889/lang-en>

AJ Bell On the Road again

We are in the process of finalising six new On the Road sessions for the autumn. Details will be announced soon but if you're interested, save one of the following dates:

- 17 September - Glasgow
- 18 September - Manchester
- 19 September - Birmingham
- 20 September - London
- 21 September - Bristol
- 25 September - Leeds

AJ Bell Connect

We launched a bespoke seminar just for Paraplanners back in December. It was called AJ Bell Connect and it proved so popular that we have decided to hold another one in Manchester on Wednesday 25 July.

Any Paraplanners who join us will get to hear from AJ Bell Investments' Head of Active Portfolios, Ryan Hughes (yes, him again - busy man) as he looks at the nuts and bolts of fund pricing and the impact of MiFID rules on transaction costs.

Tom Selby, our Senior Analyst, will be there too, explaining how to protect clients from retirement scams, and our Technical Resources Consultant, Charlene Young, will discuss ways of using the Lifetime ISA as a financial planning tool. It's a great chance to get up to speed on our platform's functionality, as well as technical issues around defined benefit transfers, divorce and the latest FCA policy statements.

Where possible the session will be linked to areas from the JO and RO syllabus, making it a very valuable experience for any Paraplanners who are currently studying for industry qualifications, or who plan to do so in future.

The event will take place in our Head Office at **4 Exchange Quay, Salford Quays, Manchester M5 3EE**. Registration begins at 1pm, with interactive sessions running between 1.30pm and 4pm - meaning that attendance at the whole event qualifies as 2.5 hours of structured CPD time.

Further information on the speakers and an agenda for the day can be found at www.investcentre.co.uk/ajbellconnect. To secure a place, please [register now](#).

AJ Bell Investival

If you are hoping to attend Investival on 15 November you need to register now as there are only a handful of places left!

Much more information about the day, including a [full agenda](#), is available at the 2018 [Investival website](#).

LISA

Just a gentle reminder that AJ Bell Investcentre recently launched a low-cost Lifetime ISA (LISA).

It has a custody charge of just 0.20% p.a. and there are no charges for initial set-up, administration, or withdrawals.

What's more, it offers the same wide investment choice and excellent level of support as our SIPP, Junior SIPP, ISA, Junior ISA, GIA and offshore bonds.

In short, we think the LISA is potentially a very useful financial planning tool for any clients who are aiming to buy their first home or save for later life.

You can take a look at our [adviser FAQ document](#) for more details.

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.

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 91% of cases.



Key contacts

Adviser Support Team

☎ 0345 83 99 060

✉ enquiry@investcentre.co.uk

Business Development Team

☎ 0345 40 89 100

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