

# Insider

July 2018

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Fergus Lyons  
Managing Director

The holiday season may have arrived, but work continues here at AJ Bell Investcentre. Planning is already well underway for a seminar tour in September, several new webinars are in the pipeline and the AJ Bell Investments team is busier than ever thanks to the increasing popularity of our MPS and Passive funds.

## AJ Bell Investcentre On the Road

Our latest AJ Bell On the Road tour will be setting off this September, visiting eight cities across the UK, from Aberdeen to London.

As ever, our wandering minstrels will be delivering an unmissable mix of investment, technical and regulatory updates that add up to two hours of CPD time.

We expect all the sessions to be in big demand, so I'd

advise you to secure your seat as soon as possible.

Full information on each seminar, including speaker line-up, timings, networking and venue details, are available at the [AJ Bell On the Road website](#).

If you have any questions about the sessions, please contact [Kirsty Zollinger](#).

## Kevin Doran's webinar

Kevin's webinar - 'Intelligent investment in the 21st century' - is now available to [watch on the Infocentre](#).

In the webinar our Chief Investment Officer laments the investment management industry's reluctance to move with the times, and explains how AJ Bell is bucking the trend by building a 21st century asset management business that utilises data science, human insight and process automation.

Don't miss our next webinar, which gives you the chance to ask questions directly whilst gaining some structured CPD time. An invite should appear in your inbox over the coming weeks.

## AJ Bell Passive funds and MPS update

The latest quarterly updates for our [Managed Portfolio Service \(MPS\)](#) and [Passive funds](#) range are now available to view.

During the second quarter of 2018 the overall picture has been positive, and we are generally very pleased with the performance of all AJ Bell Investments solutions.

Both the MPS and Passive funds range are now mapped to EValue and Defaqto risk ratings, as well as Dynamic Planner and Finametrica, so you now have a broader selection of ratings to choose from when matching our range of investment solutions to your clients' risk appetites. For more information on this, please [read our risk profiling tools guide](#).

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

## Client app reminder

Just a quick note to all those who may have missed my update last month: our new client app is now available for your clients to download free of charge on iOS and Android mobile and tablet devices.

Designed to give your clients easy access to their AJ Bell Investcentre accounts on the move, the app allows them to:

- check the current value of their portfolio(s)
- access information on the underlying investments on the Funds & Shares Service
- view their cash statement and transaction history
- read their secure messages

If you have set up an F&SS XO account for your client, the app also makes it possible for them to trade in shares, funds, ETFs, bonds and more.

## Awards

I'm very proud to say that AJ Bell Investcentre won 'Best Pension Provider' in this year's Money Marketing Awards.

This is a particularly pleasing award for us, as nominations are made on the basis of direct feedback from Money Marketing's adviser readership – so thanks very much if you put in a good word for us!

## 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 93% of cases.



## Key contacts

Adviser Support Team

☎ 0345 83 99 060

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

Business Development Team

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