

Insider

April 2021

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Fergus Lyons
Managing Director

Well, we've made it through another tax year end in one piece. The volume of business we're handling now has grown significantly over recent times; our Client Services Team stood up to the strain and I'm delighted with how well they coped with it.

As ever, time never stands still, we will continue to look at ways to improve the overall service and platform experience for you and your clients.

V2.0 functionality

Our V2.0 website has been updated again, this time to include the regular dealing functionality from our Funds & Shares Service. As a result, you can now 'basket' investments together and set up regular investments or create regular disinvestments for the existing holdings in your client's account in a more efficient way.

I'd encourage you to approach the [Business Development Team](#) if you would like to find out more. All feedback is always welcome!

Smarter illustrations

A gentle reminder to have a look at the illustrations option in V2.0. The tool lets you build illustrations and proceed straight to an online application for new clients or build illustrations for existing clients without having to re-enter any of the personal information that we already hold about them.

By saving the new client's information, this feature means you can come back to a partially-completed online application form and finish it at your leisure.

Reduced AJ Bell Funds OCF

Ever since they launched our AJ Bell Funds range, the team at AJ Bell Investments has been committed to the idea of making cost savings wherever possible, and passing those savings on to customers in the form of a reduced OCF.

That work never stops and the OCF information outlined below highlights the most recent cost reductions.

Fund	OCF
Cautious	0.35%
Moderately Cautious	0.34%
Balanced	0.32%
Moderately Adventurous	0.32%
Adventurous	0.32%
Global Growth	0.34%
Responsible Growth	0.60%

With top-two quartile (IA Sector) performance over three years, unfettered market access, and now more competitive charges than ever, the **AJ Bell Funds** are a multi-asset solution for you to consider alongside other funds, or as a standalone investment.



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

Third-party MPS

I'm very pleased to confirm that we have now introduced Waverton's MPS portfolios to the platform. And in the not-too-distant future, we will be adding 8AM Global's CleverMPS too.

You can [visit the website](#) for more details on our third-party MPS providers, or just get in touch with your BDM Team by phone or email if you have any specific questions.

Award-winning platform

The 2021 Professional Adviser awards were held during March and I was delighted to see AJ Bell Investcentre come out on top when we retained the award for the Best Platform for Advisers (AUA over £25 billion).

We have been fortunate to win a few awards over recent months – none of them would be possible without the fantastic support we get from advisers across the country who use our platform. Thank you.

Multi-asset seminar 2021

Get your diary out, because on Thursday 13 May, between 10am and 12 noon, we'll be presenting a fascinating [multi-asset seminar](#) as part of our 'Off the Road' webinar schedule.

Hosted by Danni Hewson, who recently joined our Media Team from the BBC, the event will feature contributions from:

- **Alexander Chartres, Investment Director – Ruffer LLP**
- **Andrew Keegan, Head of Wealth EMEA, Multi-Asset Strategies & Solutions – BlackRock**
- **Maria Municchi, Fund Manager – M&G Investments**
- **David Hood, Head of Central Investment Solutions – Brewin Dolphin**

Our very own Russ Mould and Kevin Doran will also be sharing their insights as part of this unique event, which counts as two hours of structured CPD time. You can see a full agenda and details of the topics to be covered [here](#).

Off the Road

If you missed our 'Off the Road' Spring 2021 special, fear not: all the videos are now available to watch anytime [via the Infocentre](#).

This session included an AJ Bell business update, talks from members of our Technical Team, and a contribution from our Chief Investment Officer, Kevin Doran.

Across the last 12 months, the team has delivered 38 sessions and, with almost 17,000 advisers joining us, they have proved popular. The Infocentre includes the full back catalogue of all sessions should you have missed any.

Adalphi acquisition

You may have seen some media coverage about our recent acquisition of the Adalphi group of companies. This is a very exciting move for us that will allow us to continue to enhance and broaden our offering, and help you service an even wider base of clients.

The Adalphi Team is working on a simplified, mobile-focused platform, aimed at helping advisers deliver a seamless service remotely. It's our belief that this kind of

mobile-led service could be a valuable way to increase your engagement with clients – not least during unforeseen events like the pandemic we are currently living through.

The team is very much in the ‘build’ phase and we will provide more details as things progress. If you would like to be kept up to date with developments at Adalpha, please leave your details with the team [via this link](#).

Fraud awareness

Unfortunately, we live in a world where it seems that fraudsters are still trying to exploit the pandemic to line their own pockets, often by targeting the relationships that exist between advisers and their clients or posing as financial institutions like ourselves in order to scam people out of their money. I would strongly urge you all to read our updated fraud awareness guide [here](#).

Please stay on the alert for anybody who contacts you claiming that ‘working from home has led to a number of protocol changes’ or anything similar. I want to reiterate that our protocols have not changed. If you do get any suspicious phone calls, texts or emails from people claiming to work for AJ Bell, please report them to us so that we can investigate.

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The value of investments can go down as well as up and your client may get back less than originally invested.