

Insider

October 2021

In this month's issue

- More business developments
- Welcome aboard the Board
- AJ Bell Investcentre V2.0
- Adviser survey
- Award-winning platform
- Upcoming events
- Third-party MPS
- Platform surveys



Billy Mackay

Managing Director, AJ Bell Investcentre

Having worked closely with Fergus for the last 13 years, it's fair to say that I have had the perfect view of the energy and drive that he has brought to our business. We have managed to grow the AJ Bell Investcentre platform from a SIPP-only offering to one of the biggest, fastest-growing platforms available to advisers. That has been in no small part due to having someone like Fergus lead the way. I would say that I will miss him but the truth is that he is very much still around and someone we will all still see a lot of – no need for the hankies just yet.

We have a saying in our business that if you can't handle change, you are working in the wrong business. So right across the AJ Bell Investcentre team, working through the recent changes has been very much business as usual. As you will see elsewhere in this edition, we continue to strengthen the Business Development Team and have been adding new features to V2.0.

Now that our financial year end has passed, I'd also like to take this opportunity to thank all of you for your support over the last difficult year. With COVID restrictions easing, I have already managed to get out and about to seminars and face-to-face meetings, and I really look forward to seeing both familiar and new faces at this year's Investival conference.

More business developments



Not so long ago, we improved the structure of our Business Development Team by making Alison Mollard Head of Sales South, overseeing the South West, South East (S) and South East (N) regions. Alison was recently named 'Woman of the Year - retirement' at the Women in Financial Advice awards - a richly deserved accolade that reflects her outstanding work and contribution to our industry over the years. Well done, Alison!

Following on from the restructure in the South, I'm delighted to announce that we have now appointed Danny Arthurs as our Head of Sales North. This will involve Danny heading up our Midlands, North West, North East, Scotland and Northern Ireland regions. He joins us with over 30 years' industry experience, having started out as an adviser in 1991, before eventually selling his advice business in 2008. After that, he helped drive the distribution strategy at a leading platform and DFM business. In 2018, he left to join the team that built the Adalpha platform, which AJ Bell acquired in early 2021 and which has since become Touch by AJ Bell.

I look forward to working closely with Alison and Danny and know that both the north and south regions are in safe hands.

Welcome aboard the Board

Earlier this year, we appointed Helena Morrissey and Evelyn Bourke as Non-executive Directors on the AJ Bell Board, and I am delighted to say that Margaret Hassall will now be joining them.

Margaret, who has just stepped down as a Non-executive Director at Nucleus Financial Group plc, brings a wealth of experience gained in a wide range of different industry sectors, and I have no doubt she will make an extremely valuable contribution to [the Board](#).

AJ Bell Investcentre V2.0

Our V2.0 website is constantly evolving, with new enhancements and developments being added regularly. More and more advisers are now using the site, so we have started to invite a few advisers at a time to move over to it as their primary route into the platform.

Recent developments on V2.0 include:

- the option to co-brand the adviser site, client site, client app and reports;
- the ability to instruct Origo-compatible transfers online for existing clients;
- a regular investment/disinvestment module; and
- the ability to add an adviser/DFM model name to the client's investment summary.

We have also introduced some brand-new functionality which gives you the option to add additional Funds & Shares Service accounts online to an ISA. This not only allows you to run multiple investment strategies within a single wrapper, but also to move assets between pots and move cash online.

It's important to point out that development never really stops, and both additional and improved functionality will continue to be introduced over time.

As ever, the [Business Development Team](#) is on hand to answer any questions you may have on how to get the best out of the site.

Adviser survey

I would like to thank the many advisers who took the time out to complete our recent adviser survey. The feedback received helps us prioritise our workload as we continue to invest in the platform.

It was encouraging to see that the fantastic efforts from our staff across the business and how they have dealt with recent challenges were highlighted strongly in the comments that we received. Some of the other key findings:

- **77%** of respondents scored the platform in the range 7–10 out of 10 when asked about whether they would recommend us to other advisers in the industry;
- **81%** of advisers said that they now regularly use the V2.0 area of our website; and
- low charges, good service and comprehensive investment choice were the main reasons that advisers recommended AJ Bell Investcentre to their clients.

Award-winning platform

We have been fortunate to win a number of the main industry awards over recent weeks – Leading Retirement Proposition at the UK Platform Awards, then Best Platform, Best Retirement Provider and Provider of the Year at the Money Marketing Awards.

None of these awards would be possible without the hard graft and effort across the entire AJ Bell team, alongside the fantastic support we get from advisers across the country who use our platform. Thank you.

Upcoming events

It was great to see the return of our face-to-face AJ Bell ‘On the Road’ autumn seminars – our series of smaller regional sessions will be taking place in the new year in Bolton, Exeter, Guildford, Brighton, Maidstone and Reading. You can find the full agenda for **AJ Bell ‘On the Road’** regional seminars [here](#).

I am also pleased to say that Investival 2021 is now only a month away, and will once again be a live event. We will be back at the Shaw Theatre, with a top line-up of speakers, including Cormac Weldon of Artemis, Abbie Llewellyn-Waters of Jupiter, Jim Leaviss of M&G and Karen Ward of JP Morgan.

As many of you will know, we like to have a theme for the day, and this year we’re paying homage to the era of gigantic mobile phones, red braces, Rubik’s Cubes and bands like The Human League, Duran Duran and The Cure. It could be time to dig out the chunky jumper and staypress. As a man of the 80s, it’s a little painful to accept that most of you won’t know what they are.

Moving on – anyone who has been to the event before will know that it is always a full house. There are only a handful of seats left, so be sure to [secure your spot](#) as soon as possible to avoid disappointment. I hope to see you there on the day.

Third-party MPS

Our range of investment options is now bigger than ever, with third-party MPS solutions available from the likes of Tatton, FE Investments, LGT Vestra and Brewin Dolphin on our platform. Details of the full range can be viewed [here](#).

You can access them across all wrappers – including SIPPs, Retirement Investment Accounts (RIAs), ISAs and GIAs. To arrange, just contact the relevant third-party MPS provider, then complete our ‘Bulk dealing and model portfolio form’ and send this to your Business Development Consultant.

Platform surveys

Share your thoughts in the latest Platform survey to get your hands on the ‘Choosing an Adviser Platform’ report.

The Platform survey will run until 22 October: surveymonkey.co.uk/r/VTGFV8M

Please get involved if you can.



This document must not be copied or reproduced, in part or whole, without permission. This information is for adviser use only. The value of investments can go down as well as up and your client may get back less than originally invested.