
Press information

13 May 2019



Nucleus launches new client portal as it champions better client communications

Nucleus, the adviser built wrap platform, has announced the launch of Nucleus Go, a brand new portal to allow an adviser's clients to engage with their investments digitally and on the go, and to help create better client communications in financial advice.

Adding to its award winning platform, the new tool, which is being launched following an extensive period of testing by a group of Nucleus users, has been designed to allow an adviser's clients to easily engage with their portfolios, leading to more focused and meaningful conversations in client reviews.

Following a successful testing period, the portal has also been designed mobile-first using responsive web design techniques. This means clients can access their portal on phones and tablets, as well as other devices, allowing them to view their portfolios at any time and wherever they are. The functionality gives easy access to commonly-requested information such as money paid in, withdrawals, fund switches, holdings, gains and losses, as well as more detailed investment analysis over any date range they like.

Nucleus Go comes amid a push by Nucleus to have better client communications in the industry. It has already made much of its adviser's correspondence with clients paperless, including the new costs and charges statements as part of Mifid II.

Andrew Smith, chief technology officer at Nucleus, said: "We have had a fantastic response to our latest development from our user base during testing and we are really looking forward to rolling Nucleus Go out widely. We are always looking for ways to make easier for advisers and their clients, so quality financial planning can be delivered in an efficient way. Technology is always at the forefront of our business and we are constantly looking for ways we can improve upon the platform and develop the user experience.

"Advisers are integrating technology into their businesses more than ever before, and this engagement has allowed us to really focus on how we can improve our own technology to help them. The initial testing phase has been well received from a selected group of Nucleus users, but we always want to receive feedback from anyone using the portal and the wider platform so we can keep developing and improving."

- Ends -

For further information please visit www.nucleusfinancial.com or contact:

Gregor Dickie, MRM – 020 3326 9918 / 07471 350 286

About Nucleus

Nucleus is a wrap platform founded in 2006 by advisers committed to altering the balance of power in the industry by putting the client centre stage.

Since then, Nucleus has established itself as a major force for change. It is now one of the UK's fastest-growing platforms and the meeting point for over 870 adviser firms in total seeking to create better customer outcomes.

As at 31 March 2019, assets under administration on the platform were £14.8bn.

w: www.nucleusfinancial.com

t: @nucleuswrap