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Nucleus broadens scope of its Advisory Board and appoints new independent chair

Nucleus Financial Platforms, one of the UK's leading, independent, adviser platform groups, announces that Heather Hopkins has been appointed as chair of its Advisory Board. And in a move to become more representative of the group's wider user base, its remit has been expanded to also include advisers using the James Hay platform.

Heather is Managing Director and Founder of NextWealth, a specialist consultancy that helps individuals and organisations with a stake in the future of financial advice understand what's next in wealth. In a career spanning Toronto, Boston, Tokyo and London, she's gained a strong reputation as a data and research expert, specialising in the UK financial adviser and retail wealth management markets.

As chair, Heather will work closely with Nucleus CEO Richard Rowney and Chief Commercial Officer Alex Kovach to ensure effective engagement among the cross-section group of twelve advice firms.

For many years the Advisory Board has played a crucial role in helping the Nucleus executive team make key strategic and propositional decisions. It's also a valuable forum for airing and debating the many issues affecting advice firms today, from regulatory and technological, to general practice management.

Heather Hopkins, Chair of the Nucleus Advisory Board said: *"I've long admired Nucleus' approach to involving advisers in its strategic thinking via this board, and I'm now pleased to have been asked to play an active part in it. It's vital platforms deeply understand both the views of advisers on the market and what they need from their partners, along with what specifically the Nucleus group can do to support them. I look forward to chairing the board and helping Nucleus better understand the needs of its adviser customers."*

Richard Rowney, Nucleus CEO added: *"We've run the Advisory Board since inception over sixteen years ago, and over that period it's played a pivotal role in helping our team understand what's important to advisers, shaping the platform's strategic direction and the development of the proposition. We're delighted that Heather has agreed to be the first independent chair, as she brings extensive commercial, regulatory and sector knowledge, which will be so useful to us all."*

"I have no doubt she'll be a strong chair and will help ensure we focus on the topics our users care deeply about, ultimately ensuring we're both delivering great outcomes for their clients."

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About Nucleus

The Nucleus Financial Platform Group offers investment platforms that help make retirement more rewarding. Our two platforms are run exclusively for financial advisers, with over 160,000 UK customers.

Renowned for its SIPP expertise, James Hay Partnership has been working with larger financial advisory groups for more than 40 years, providing the means to administer pensions, savings and investments in a cost and tax efficient way.

Our award-winning platform Nucleus was acquired by James Hay in September 2021. It was founded in 2006 by advisers committed to altering the balance of power in the industry by putting the customer centre stage.

Nucleus is the name of the combined business and together it's already one of the UK's leading, independent, adviser platform groups, with approximately £43.5 billion* in assets under administration.

To find out more visit: www.nucleusfinancialplatforms.com

* Source: the lang cat Platform Market Scorecard Q4 2022