

16 October 2023

## Wesleyan With Profits Fund added to Nucleus Wrap

Nucleus Financial Platforms, one of the UK's leading, independent, adviser platform groups, is now offering with profits on its Nucleus Wrap platform in partnership with Wesleyan.

The Wesleyan With Profits Growth Fund - the first With Profits fund designed specifically to sit on independent adviser platforms - aims to be a long-term investment solution, investing in a range of asset classes to diversify risk. The fund has a proven track record of delivering healthy returns over the longer term and aims to achieve greater consistency of returns through its unique smoothing mechanism which reduces the impact of short-term price fluctuations.\*

Advisers accessing the fund benefit from daily pricing, daily smoothing and daily trading, providing a transparency and flexibility not previously associated with With Profits funds. Other features of the fund include:

- Can be blended with existing investment proposition
- No MVAs, unit price adjustments or maximum withdrawals
- Life and pension funds available within ISA and JISA accounts
- Pension fund available within the pension account
- Comprises 75% real assets (65% equities / 10% property)
- FE risk score currently 10/100

**Paul Bagley Nucleus Distribution Director said:** "We're pleased to be partnering with Wesleyan to make this with profits fund available on our Nucleus Wrap platform, for both pensions and ISAs.

"Our ambition is to become the best retirement focused adviser platform. As such, delivering the broadest range of investment solutions offers greater choice for advisers, helping them to deliver better outcomes for their clients and ultimately making their retirement more rewarding.

"We're always listening to what advisers want and we know that demand to include with profit funds as part of centralised investment propositions is growing."

**Mario Mazzocchi, Wesleyan Group Chief Executive added:** "We're delighted that Nucleus's advisers and their clients now have access to a strong, actively managed smoothed fund. Smoothed returns offer a more consistent investment journey which is particularly attractive to investors in the current economic climate.

"As a financially strong mutual, we are able to maintain a high exposure to equities in the Fund delivering the potential for extremely competitive long-term performance.

"Wesleyan was the first provider to make a smoothed fund available via an independent platform because we recognised there was a long-standing gap in the market.



"This new partnership with Nucleus shows that we have created a flexible product that can easily be incorporated into a diversified portfolio on platform."

**Enquiries:**

Linda Harper

Head of Public Relations

E: [newsroom@nucleusfinancial.com](mailto:newsroom@nucleusfinancial.com)

T: +44 (0) 7876 145309

Nicola Pledger

PR Manager

E: [press@wesleyan.co.uk](mailto:press@wesleyan.co.uk)

T: +44 (0)7384 795544

## Nucleus

The Nucleus Financial Platforms group offers investment platforms and products exclusively to financial advisers, that ultimately help make retirement more rewarding.

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 founded in 2006 by advisers committed to altering the balance of power in the industry by putting the customer centre stage.

Curtis Banks is one of the UK's largest administrators of SIPP and SSAS solutions for customers and businesses. It is one of Europe's largest commercial property landlords, a specialist area for self-invested pensions. The business maintains a focus on providing high levels of technical support, robust service, modern technology and innovation.

Together we're one of the UK's leading, independent, adviser platform and product groups, with approximately £80 billion in assets under administration, helping nearly 5,000 advisers make retirement more rewarding for almost 250,000 customers.

To find out more visit: [www.nucleusfinancialplatforms.com](http://www.nucleusfinancialplatforms.com)

## Wesleyan

Wesleyan is a UK-based financial services mutual offering a range of personal, professional, commercial and investments products through the Wesleyan Group of companies.

The Wesleyan Group has £7.2 billion of assets under management as at 31 December 2022.

Wesleyan was founded in Birmingham in 1841.



Wesleyan's Investments Team was named Investment Team of the Year 2023 at the Insurance Asset Risk Awards.

To find out more visit: [www.wesleyan.co.uk/intermediaries](http://www.wesleyan.co.uk/intermediaries)

\*Wesleyan With Profits Growth Pension Fund Series A Factsheet