

Press information

17 June 2011

Nucleus IFAs to open doors on ‘Independent Day’

Member adviser firms of Nucleus are opening their doors to fellow advisers on ‘Independent Day’* (Monday 4th July) in a series of open days designed to showcase the benefits of being part of an adviser-owned wrap platform.

The open days, which are being held at seven locations around the UK, have been specifically designed to provide non Nucleus member advisers with the opportunity to meet their local peers, as well as learn more about the Nucleus proposition. Nucleus will provide a demonstration of the functionality of the platform and hold a discussion on the subject of platform due diligence.

The Open Days will be held at the following IFA offices:

- F A Watts Investment Managers – Hampshire
- Equilibrium – Cheshire
- W R Financial Management Ltd – Stockton on Tees
- Helm Godfrey – London
- Intelligent Capital Ltd – Glasgow
- Smith & Pinching Ltd – Norwich
- The Fry Group – West Sussex

There will be a Nucleus representative at each location and Nucleus chief executive David Ferguson will be presenting a webcast at the start of the sessions to introduce the day. There will be two sessions, the first from 12pm till 2pm and the second from 4pm to 6pm.

Commenting on the series of ‘Independent Days’, Nucleus chief executive David Ferguson said: “The Nucleus story is all about IFAs taking greater control of their business. As RDR approaches ever closer, we have seen a surge of interest from firms undertaking platform due diligence and looking to partner with a proposition that gives

them more control over the delivery of their chosen client proposition. While the team and I believe Nucleus is that proposition, what better way for non- member advisers to learn about it than from the advisers who actually use and own it.”

If you would like to attend one of the open days, please contact Nichola Burns at Nucleus on events@nucleusfinancial.com or call on 0131 226 9800

-Ends-

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

Andrew Appleyard, MRM – 020 3326 9908 / 07909 684 468

Katy Moore, MRM – 020 3329 9904 / 07584 235 806

Notes to editors:

* In July 2006, a small group of independently-minded IFAs established Nucleus in order to build their own platform and take greater control over their businesses. ‘Independent Day’ marks the 5th anniversary of the inception of Nucleus.

About Nucleus

Nucleus Financial Group is an online wrap based business platform.

Nucleus was founded in 2006 by a number of high quality IFAs who shared a commitment to create a market where advisors have the infrastructure and desire to place the client centre stage.

Since foundation Nucleus has established itself as a major force for change in the market. It is now a community of IFA businesses who through ownership and control of the business process seek to create a better customer experience.

The management team is led by David Ferguson chief executive, and offers extensive experience across all areas of the UK retail financial services market.

In 2010, Nucleus’ IFA-firm total reached 80 and the platform also broke the £2bn AUM barrier.