

Press information

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Nucleus unveils Carl Richards as keynote speaker at Adviser event; Nucleus 2014

Nucleus, the adviser influenced wrap, has announced Carl Richards as keynote speaker for its annual adviser strategy event. A certified financial planner and international artist to boot Richards will use his world famous sketches to illustrate how Nucleus advisers can counter poor financial client decisions.

Author of *The Behavior Gap*, Carl has become famous for illustrating complex financial matters through the medium of cartoon. He is currently Director of Investor Education at the BAM ALLIANCE. He coined the term “behavior gap” in 2007 to describe the gap between the higher returns investors could earn and the lower returns they actually earned, explaining that some investors earn lower returns because they buy and sell at the wrong time, not because of the actual investments they chose. His book of the same name was released two years ago.

Carl said:

“Nucleus 2014 looks set to be an exciting event for the industry and I’m really excited to be a part of it. There will be some real experts in the room on Thursday; I’m looking forward to meeting some fellow thinkers and hopefully coming away with some fresh thinking and ideas for new sketches.”

David Ferguson, CEO, added:

“I have been a fan of Carl’s work for some time now and I am more than a little excited that he can join our flagship adviser event. To welcome such an innovative, pioneering speaker to the stage on Thursday will be a personal highlight. Carl has a wealth of knowledge about the industry, as well as some more inventive ideas which we hope will stimulate new conversations with all who attend.”

The event is sold out and is set to be the biggest yet. Other speakers include Steve Bee of jargonfree, Tony Wickenden of Technical Connection, Colin Lawson of Equilibrium and Lucian Camp of Lucian Camp Consulting.

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

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Notes to editors:

About Nucleus

Nucleus operates a wrap platform which has been build on the core principles of transparency and collaboration.

It was founded in 2006 by financial advisers with a shared commitment to create the infrastructure that would allow them to distance themselves from platform product bias and place their clients centre stage.

Since then (and as at 31 January 2014) Nucleus had signed up more than [3000] advisers and assets under administration were around £6.4bn.

<http://www.nucleusfinancial.com/>