
Press information

27 February 2018



Nucleus brings together expert panel to help advisers make sense of the DB transfers saga

With defined benefit (DB) pensions hitting the headlines in recent months, Nucleus, the adviser built wrap platform, has brought together a panel of leading experts and financial advisers to help the adviser community navigate their way through the market and approach DB transfers.

Chaired by Nucleus' Natalie Holt, the panel discussed what advisers are currently seeing in the market, the FCA's response to the increase in demand for these services, how advisers should engage in DB transfer specialists and if partial transfers should be made more widely available, amongst other topics.

The session was filmed and further educational content can be accessed by advisers through Nucleus' best practice website [Illuminate](#).

The panellists for this debate were:

- Rachel Vahey, Product Technical Manager, Nucleus
- Claire Trott, Head of Pensions Strategy, Technical Connection
- Matt Connell, Director of Policy and Engagement, Personal Finance Society
- Tim Eadon, Director, Tuto Associates
- Mike Seddon, Managing Director, Grayside Financial Services

The initiative will become a regular occurrence with Nucleus holding subsequent roundtables with industry experts and advisers under its Illuminate knowledge hub to explore further topics within the pensions landscape.

Rachel Vahey, Product Technical Manager at Nucleus, said: "Regulators and policymakers are sitting up and taking notice as the level of debate stirred up by defined benefit transfers shows no sign of abating. Demand among savers has been driven by the high transfer values on offer, and the opportunities offered by pensions freedoms to shape income. Transferring your final salary pension has become a conversation topic among co-workers and this will only fuel demand further.

"Advisers now need to take a call on the level of involvement they want within in this market, and how they will meet this new demand from current and potentially new clients. Making sure of your firm's approach on this area is key.

"Holding roundtables like this and speaking to policymakers, experts and financial advisers allows us to assess where the industry is at and what advisers need to be doing to navigate the minefield and ensure the best possible outcome is achieved for all involved.

- 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 more than 400 adviser firms in total seeking to create better customer outcomes.

As at 18 August 2017, assets under administration on the platform were £13.0bn.

w: www.nucleusfinancial.com

t: @nucleuswrap