

Press information

17 August 2011

Nucleus introduces new valuation tool for advisers

Nucleus, the IFA-owned and controlled wrap platform, has introduced a new valuation tool designed to improve the quality of information available to advisers and their clients.

The tool, which has been developed in conjunction with the platform's adviser community, is part of Nucleus' on-going commitment to ensure users have access to the right information in the most useful format.

Available with immediate effect, the new tool includes a single screen summary which enables advisers to see in one place the total money invested by a client and the value of it at any given time.

Commenting, Nucleus chief operating officer Andrew Smith, said: "We are constantly looking for ways to improve the level and quality of information available to member firms and their clients. This latest development is part of that ongoing process and is designed to ensure the advisers who use the Nucleus platform have the tools at their fingertips with which to deliver the best service possible to their clients."

-Ends-

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Notes to editors:

Wrap summary screen

Top-up/add investment Account detail ▾ Tools & reports ▾  Download PDF

Wrap summary

Name [Client Test](#)

Client reference 123456789

Type	Name	Account ID	Joint owner(s)	Money in £	Money out £	Valuation £	% of portfolio
General		N111111		160,100.50	25,980.00	159,593.80	80.23
Isa		N222222		37,019.88	0.00	39,335.20	19.77
Memo assets						0.00	0.00
Portfolio Total				197,120.38	25,980.00	198,929.00	

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 July 2011, Nucleus' IFA-firm total reached 78 and the platform also broke the £3bn AUM barrier.