

20th November 2013

Personal Touch Launches New Wealth Management Strategy, Platforms and Provider Panels

Personal Touch Financial Services today announced its new wealth management strategy including the names of the platforms, providers and panels that the network has selected to support its new consumer-led proposition.

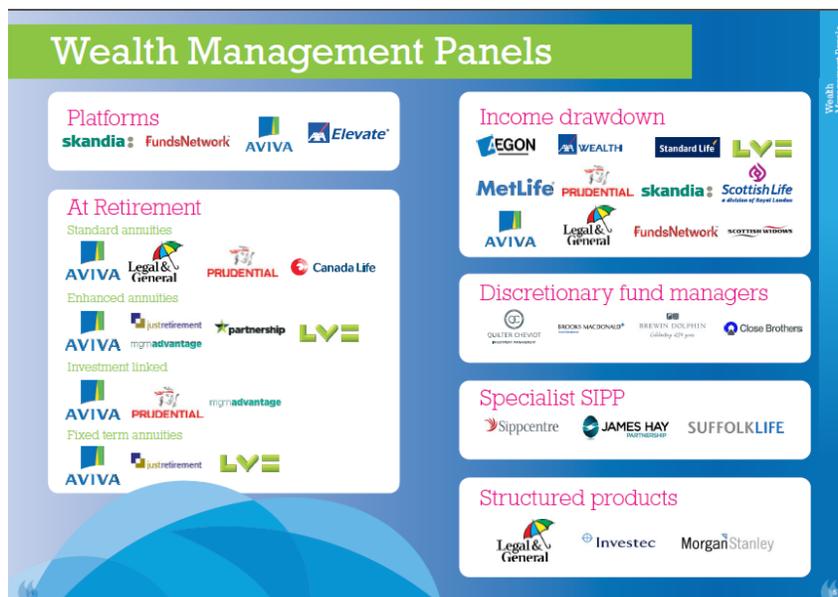
The selection of the new Personal Touch wealth management panels was made on the basis of several different factors including financial strength, based on AKG ratings and demographic fit. All companies chosen in the final selection were able to meet strict TCF-based criteria which included cost transparency, technology efficiencies and the ability to provide ongoing training and support for members together with value to their clients.

Central to the new wealth management strategy are the core objectives of minimising risk, improving process efficiencies and enhancing client terms with the development of a dedicated Wealth Support Team helping members throughout the transition.

David Carrington, marketing director of Personal Touch, explains:

“Our new wealth proposition is aimed at bringing together the very best providers in each wealth sector to support the delivery of high quality advice and value for money services for our member firms and their clients. Our advisers also have access to a range of model portfolios and active and passive fund ranges through our link with fund experts, Rayner Spencer Mills. In designing our new improved proposition we worked closely with research specialists Defaqto in putting together a range of panels which will help reduce due diligence time and allow our members to control risk within their businesses, whilst improving client outcomes through improved terms”.

Personal Touch Financial Services – Wealth Management Panels



Platforms

Aviva, AXA Elevate, FundsNetwork, Skandia

Discretionary Fund Managers (DFM)

Brewin Dolphin, Brooks Macdonald, Close Brothers, Quilter Cheviot

Annuities

Aviva, Canada Life, Just Retirement, Legal & General, LV=, MGM Advantage, Partnership, Prudential

Specialist SIPP

James Hay, SIPP Centre, Suffolk Life

Structured Products

Investec, Legal & General, Morgan Stanley

The new wealth management strategy was unveiled to Personal Touch member firms at a one-day Wealth Management conference on Wednesday 20th November at the Birmingham Hilton Metropole. Photos and further news from the day will be shared via Personal Touch's social media: @ptfs (twitter), facebook.com/personaltouchfinancialservices and Linked-In company pages.

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Notes To Editors

Personal Touch Financial Services is a privately-owned professional adviser network. Established in 1994, the Company is authorised and regulated by the Financial Conduct Authority (FCA). Personal Touch Financial Services provides business, technical and regulatory support to a community of highly-qualified member firms, with a focus on the mortgage and protection sector.

Personal Touch is committed to running a consumer-focused organisation with professional standards and service quality at the core of this.

In its investment and pensions operation, Personal Touch operates a broad-based, restricted advice proposition with professionally qualified advisers supported by dedicated bespoke technology, compliance and business development resources. Adviser members benefit from the additional support of a robust PI policy giving legal protection which can otherwise cost firms considerable additional expenditure.

Distributing a diverse range of products from a comprehensive panel of major and specialist lenders, the company has four main areas of business:

- Protection
- Mortgages
- Investments and pensions
- General Insurance