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Further plans announced to enhance adviser usability, online services and adviser support

James Hay Partnership, the platform for retirement wealth planning, today announces its latest initiative on its journey to being considered by advisers as a Centre of Excellence.

Following several online initiatives at the turn of the year, the next phase, to be rolled out on 1st May, will focus on Customer Services. The restructuring of Customer Services was prioritised as the increased volume and duration of calls off the back of pension flexibility exposed a weakness in being able to handle spikes of that scale while maintaining consistently high service levels.

The lessons learned from pension flexibility will see Customer Services restructured into four tiers, consisting of three specialist administration teams covering transfers, trading and benefits and an overarching, highly trained customer relationship management (CRM) team. The CRM team will own enquiries and see them through from start to finish, drawing on the specialisms of the transfer, trading and benefits teams where necessary, before going back to the client.

The platform is additionally creating a new, dedicated Technical Operations and Sales Support team, which brings under one umbrella the extensive expert technical support the platform offers advisers on tax, trusts and pension legislation.

CEO Alastair Conway said: “Like most providers, pension flexibility put a real strain on Customer Services as the duration, complexity and sheer volume of calls coming into the business went through the roof. Understandably, that had a knock on effect on service in general, which we took extremely seriously. What we’ve developed is a scalable Customer Services solution that future proofs the business – I have ambitious plans for James Hay so scalability that ensures consistently high levels of customer service is key. The restructuring of Customer Services and the creation of the dedicated expert technical support function are the first steps in our ambition of establishing a Centre of Excellence – we’ve got a unique opportunity here and we’re aiming high.”

-ENDS-

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Notes to Editor

James Hay Partnership, the platform for retirement wealth planning, has been working with financial advisers and clients for over 30 years to administer pensions, savings and investments in a cost and tax efficient way. Today nearly 56,000* clients trust us to look after more than £19.4 billion* worth of pension and investment savings.

From the very first day we have challenged industry norms as we've responded to changing client needs - from being the first SIPP provider in the UK, through to developing our modular approach to retirement wealth planning, which we launched in 2013.

The Modular iSIPP embraces fair and flexible pricing meaning the customer only pays for what they use, while they use it. This has now been evolved through the Modular iPlan to include other non-pension wrappers such as GIAs and ISAs.

We are able to continue to innovate thanks to being part of the IFG Group, a focused financial services company specialising in the provision of independent financial advisory and administrative services.

Headquartered in Dublin, Ireland, IFG Group plc is listed on the Irish and London Stock Exchanges.

*as at December 2015

Any quotations are correct as at the date of the press release.