

21 August 2014

ALEXANDER HOUSE JOINS CAERUS

Alexander House Financial Services, the financial advisory business and part of the AHFS Holdings plc Group, today announced that it has become part of the CAERUS Capital Group after its advisers voted unanimously for the move.

Alexander House Financial Services prides itself on offering a new approach to financial advice, putting the customer at the heart of its operation. It has also established new ways of delivering advice, notably through virtual advisers on video conferencing, and records every adviser-client conversation, which will then be made accessible via the client portal.

Nick Kelly, Chief Executive of Alexander House and formerly Managing Director of Distribution at Sesame Bankhall Group, said: “We needed a forward thinking, progressive network to support our endeavours and take us to the next level in our continued expansion, filling the advice gap left after the withdrawal of bancassurers and flight of other nationals to HNWs post RDR. Our multichannel distribution model, using both traditional and virtual F2F advice allows the customer to decide when, where and how they want to engage with us and our state-of-the-art, leading-edge technology records these interactions to ensure that the right outcomes are achieved for our customers”.

The firm was established 18 months ago with the mission of delivering traditional values, modern thinking and transparent advice. The business’ founders recognised an opportunity to address the needs of those customers who may have been deserted by banc-assurers and are looking for value for money financial advice, specifically the un-served middle that has been created as a result of RDR.

Keith Carby, Chief Executive of CAERUS Capital Group, comments: “We are delighted to welcome Nick and his team into the CAERUS partnership. Alexander House is a new type of advisory business and I believe that many of the principles they have embraced will become

the industry norm in the next few years. We look forward to working with Nick in the years ahead to help build on what is already a very strong proposition.”

The firm also places an emphasis on financial education, and its brand ‘Smart Alex’ allows consumers to learn more about personal finance through an interactive website, without any commercial obligation. The Smart Alex, friendly, simple approach is then carried forward into the clients’ own financial portal so they can continue to be educated and informed as the relationship grows.

Clients who do wish to seek advice are offered choices of fees which are published on the website, to ensure complete transparency.

For more information, please see www.alexanderhousefs.co.uk

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Editor’s Notes

About Alexander House

Who are we?

- Alexander House is a professional financial advisory service. Established by a highly experienced management team, who want to deliver high-quality services to people who need sound and trusted advice. [Traditional Values](#), [Modern Thinking](#), [Transparent Advice](#).

Why are we different?

- We will provide you with your own online financial site – ‘Smart Alex’ – see your plans and play on our planning tools

- We will be available to you via the phone, email, web conferencing or by face to face – whichever way you want and whenever you want 24/7
- We will use the secure, market leading technology to save you money, and put you in control of your personal financial affairs
- We will record all of our interactions so we can check you have the right product and that you understand the advice you have been given
- We will also be completely transparent in our charges and what we will do for you
- We won't use your data or your identity for any other purposes, we want you to trust us.
- We will guarantee that you are recommended a suitable product that matches your needs and will explain any risks that affect you- so you fully understand what you are investing in.

About CAERUS Capital Group

CAERUS Capital Group Limited (CAERUS) was established in 2010 to combine fund management with advice for the benefit of both advisers and consumers. CAERUS comprises companies offering specific financial services to adviser firms (intermediaries) and, via those firms, to consumers.