

# Professional Paraplanner Awards 2022

## BEST PROVIDER WEBSITE

**F**idelity Adviser Solutions scooped the Best Provider Website award for the second time in three years, achieving highly commended in 2021. Paraplanners who nominated Fidelity for this year's award praised the company's technical support and materials, and in particular, it's dedicated Paraplanner Hub. As one paraplanner commented: "It shows they value our role in financial advice."

Jackie Boylan, Head of Fidelity Adviser Solutions, says they specifically look to support paraplanners "because we recognise they are a critical part of the industry who often don't get the recognition or support they should. They are helping to professionalise the industry and deliver better solutions to clients and we want to support them as much as we can.

"This includes helping with exams, training, seminars, like the *Professional Paraplanner* Technical Insight and Team Leader Seminars, and providing really easy access to technical content.



What paraplanners need to know is complex, so anything we can do to support this we will, as we know it can aid in providing better outcomes."

Other areas Fidelity has received positive feedback on from paraplanners, Boylan says, is the Sustainable Investing hub, which provides a range of materials and tools to help paraplanners get under the bonnet of this complex area.

"Providing an intuitive online experience is also critical for us," Boylan adds. "We have done a lot of work over the past couple of years on making our service easy to use, in particular getting more digital. Now paraplanners can get hold of the information or undertake the task they need to online, without having to call us if they don't want or need to. That's been really important for us to develop."

She also highlights the company's B2B reports. "Through these reports we can provide insight into clients in so many different ways. I think we have a report for absolutely everything a paraplanner could need, and the data can be manipulated so an advice firm can tailor it specifically to its requirements."

A major change for the company in the past year, was the transition from the name Fidelity FundsNetwork to Fidelity Adviser Solutions. Boylan explains: "Fidelity FundsNetwork was one of the first funds platforms and is synonymous with that market, so it was a big decision, with implications. But we wanted a name that better depicted who we wanted to be as a business, and the services we wanted to provide and develop in the future for advisers and paraplanners. That includes better ways to provide integrated solutions that provide better outcomes not just for adviser businesses but for their clients.

"It has given us more scope to look at fintechs, and where we can, use our scale, our Strategic Ventures arm and the benefit of having a global presence, to bring different ideas or opportunities to our adviser firms."

One of those opportunities has been to partner with Canadian FinTech company, Conquest, in offering new financial planning software to the UK market. "The software helps to build financial plans faster and more efficiently, whilst providing consistent and compliant outcomes for clients."

Boylan adds: "We want to thank all the paraplanners who voted for us. We are all in this business because we genuinely want to help clients build better futures, whether that is wealth creation/protection/achieving certain goals or just peace of mind - it is likely to be all of those! We strongly believe that providing resources, particularly technical content for paraplanners, really helps to achieve that."

