

**Sesame Bankhall Group Ltd**

Registered Office: Pixham End, Dorking, Surrey RH14 1QA  
Registered in England No. 3573352

[www.sesamebankhall.co.uk](http://www.sesamebankhall.co.uk)

## PRESS RELEASE

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### **Sesame Bankhall Group appoints James Stevenson to lead new adviser technology team**

Sesame Bankhall Group has strengthened its senior team with the appointment of James Stevenson as Head of Adviser Technology.

The group has recently announced a series of investments in new adviser services. Stevenson will have a key role in developing the adviser technology strategy that will underpin many of these new initiatives. This includes the design and implementation of the group's new client and practice management system that is currently taking place in conjunction with technology provider IRESS.

Stevenson will also build the adoption team that will promote and deliver this new technology solution to Sesame network members and Bankhall customer firms in 2012. The team will work with IRESS and its other partners to deliver a complete, end-to-end technology solution for advisers covering both initial and ongoing advice. It will offer advisers a wide range of useful features, including Client Portal and Smartphone support.

With 20 years experience in adviser technology, Stevenson joins from Avelo where he was Head of Financial Planning & Wealth Management, with responsibility for the delivery of technology solutions to organisations including Aviva, RBS, Nationwide Building Society and Intrinsic Financial Services. Prior to Avelo, Stevenson was Head of Software Delivery at Focus Business Solutions and has also held senior roles with Accenture, CMG and AXA.

George Higginson, Sesame Bankhall Group CEO, said: "We are investing in valuable new services for our members and that includes recruiting experts with the skills and knowledge to ensure that advisers and their clients reap the full benefit from these new developments. With James' wealth of industry experience I am confident that he will be a strong leader for our new adviser technology team and will ensure our group's continued development and success."

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James Stevenson added: "Sesame Bankhall Group has an impressive standing in the UK advisory market and has earned a strong reputation for delivering a first class service to its members. I am excited about joining the group at a time when it is making significant investments in innovative new adviser technology. The solution from IRESS will be a real differentiator and brings to the UK a unique blend of breadth and depth of functionality across front, middle and back office. The system will give adviser firms the ability to automate many repetitive activities, ensuring consistency of advice service and lower operational costs. It is investments like this that will help our members build efficient and profitable advice businesses in a post-RDR world. I look forward to playing a key role in empowering firms through efficient technology and enabling them to enhance the range and depth of services they offer clients."

**- Ends -**

**Further media enquiries**

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**About Sesame Bankhall Group**

Sesame Bankhall Group operates three distinct distribution brands.

- Sesame is the UK's largest appointed representative (AR) network with 1,400 member firms.
- Bankhall is the market-leading support services business for 1,900 directly regulated IFAs.
- PMS operates the largest mortgage club for directly regulated mortgage brokers in the UK.

Services provided include compliance and regulatory support, access to one of the UK's most comprehensive training and development programmes, in-depth product research, preferential PI terms and access to the latest technology to enable advisers to write business more efficiently.

Sesame Bankhall Group is making significant investments in new adviser services, with recent announcements that include:

- A new Attitude to Risk and Portfolio Analysis tool;
- A new client and practice management system that is currently being developed in conjunction with financial services technology provider, IRESS, and will be launched in 2012; and
- Optimum Investment Management, a new joint venture between Sesame Bankhall Group and Henderson Global Investors that will enable advisers to create bespoke investment solutions for their clients.

These new initiatives will link to the group's investment platform strategy and new restricted advice service.