

BEST PROVIDER WEBSITE

Fidelity Adviser Solutions

One way paraplanners reward the firms that they believe deliver the best for them is through the *Professional Paraplanner* awards. Fidelity Adviser Solutions has a long history of supporting the paraplanner community and providing technical details and other information that help paraplanners in their day-to-day role.

The Fidelity Adviser Solutions website offers a dedicated Paraplanner Technical Hub, which delves into the rules and nuances of tax and pensions legislation – a facility that undoubtedly has helped Fidelity win the Best Provider Website award for a third successive year.

“We were talking about this the other day in the office,” says Jackie Boylan, Head of Fidelity Adviser Solutions. “Paraplanners are a fundamental part of financial planning. They are crucial to the research, recommendations and outcomes for clients but to some extent they have been under invested in by the industry. Which is why we think it is important that we help support what they do.”

The strapline of the Hub is ‘Supporting paraplanners in a world of constant change’. Fidelity looks to help paraplanners understand and embrace new regulatory and legislative frameworks, and to put some meaning around change – such as the Lifetime Allowance announcement in the 2023 Budget, Boylan says.

“For us, it’s about responding as fast as we can, using the full technical resources we have at our disposal. And we put out the information in the best way possible. We’ve put together a lot of webinars where our experts explain what’s



Martin Rooks, Head of Advisory and Partnership Marketing receives the award from Rob Kingsbury

happened and what it means for financial planning. We use webinars to reach as many people as we can as quickly as we can.

“We’ve run webinars on things like Consumer Duty, ESG and the Budget changes. And we try to mix it up, so some will be in interview format, some presentations, and we’ll have internal experts like Paul Squirrell as well as bring in external experts too, to talk on specific subjects.”

The hub also provides access to other technical material. “At the moment we have guides and insights on State Pension considerations, and the challenges and strategies in retirement, and we’ll update them as things change.

“We also have our online Pensions Forum, where paraplanners and advisers can ask technical questions and Paul Squirrell, our pension expert, will answer them. We find that there are common

questions and having them answered on the forum can help a lot more people.

“Not many companies are providing the level of technical support we do. We think it’s important that we use our in-house expertise where we can, to help achieve the result we’re all aiming at, better service and outcomes for clients.”

When navigating x-many websites during a day, having one that delivers, in the words of one paraplanner, “clear navigation and quality technical content”, is a boon. The design principle behind the website build, Boylan says, “is the principle we use with everything we develop and that is to look at it through the users eyes; what are they trying to do and what’s the best way to help them do that.”

“We do lot of ethnographic research, through which we put people into adviser offices to look at how people are using technology and working, so we can fully understand what’s needed. We then co-design a solution with users and test it to make sure it works as is wanted. Once live we can see how the website is being used and our continual improvement teams continue to monitor and make enhancements as we go on. So there is a lot of technical analysis behind why the website works as it does.”

On winning the award, Boylan says: “It is absolutely awesome to win the award for the third time. Thank you to all the paraplanners who nominated us. We genuinely appreciate the support and the wonderful recognition that this award provides.”

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