



Case Study:

Ascentric: Building on success

KEY METRICS

- £7bn AUA
- 250 Employees
- 40,000 Clients
- 3,000+ Assets

“Altus brought a rare combination of business, technology and market expertise which helped us to put our key challenges into perspective and to find pragmatic solutions.”

Hugo Thorman, CEO, Ascentric

BACKGROUND

Ascentric has always been at the leading edge of platform development. An early pioneer of the wrap account concept, Ascentric was among the first to introduce ETFs to its platform and still leads the pack on model portfolios. Innovation has brought impressive results with over £7bn of assets now invested via a platform which unlike most is operating profitably.

But that growth has led to technology challenges as advisers continued to push both functionality and transaction volumes far beyond the original blueprint. The time had come to take a step back and plan for the next phase of growth.

ALTUS ENGAGEMENT

Ascentric knew that any technology overhaul of the platform would be complex, multi-dimensional and time-consuming and quickly decided to look for help. The key requirements were a proven change methodology, deep systems expertise and a demonstrable understanding of platforms and, after a careful procurement exercise, Altus was selected as their strategic partner.

With a track record of delivering both operational and technology solutions to complex challenges across the Financial Services industry and with pre-built platform models to provide a baseline, Altus was a natural choice.

Find out more

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