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For Immediate Release

Novia wins with Stonewater

Stonewater Wealth Management Ltd, the advisory firm based in Tarleton, Lancashire has chosen Novia as its new wrap provider

Stonewater, with over 500 active clients and 6 RIs have been providing financial advice for over 15 years to individuals with a range of different needs.

Geoff Catterall, a Director at Stonewater comments;

"Our ethos is to build and preserve our client's wealth and not to take them on a roller coaster ride. As part of our on-going business model we have been using pre-defined portfolios for the last 3 years. We wanted to maintain this approach yet bring in the right level of expertise to help set up and run portfolios more efficiently and we were impressed by Barmac's Andrew McCarthy and the investment process he uses. We now use Barmac as our preferred Discretionary Fund Manager."

"Equally we wanted to have an influence over the portfolios and remain in control of client's assets. By using the Novia wrap we are able to do just that. Easy to use technology is one benefit but also vital for us is good communication and we get that with Novia - both on the ground locally and with the administration team in Bath."

Paul Boston, Sales Director at Novia adds;

"We are delighted to be working with Geoff and the team at Stonewater. We are seeing more advisers who want to deliver solid financial advice and regularly review their clients' needs while outsourcing the investment management to Discretionary Managers. By allowing the assets to be allocated and adjusted by the DM yet still held on our platform, the adviser doesn't lose control even if the DM is changed at any time."

- Ends -

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Notes to editor:

Novia

Novia Financial plc launched to market in October 2008 to provide a comprehensive wealth management service or 'full wrap platform' for investment advisers and their clients. Novia provides a transparent pricing structure as well as access to a wide range of product wrappers each with their own Cash Facility, an extensive suite of portfolio management tools, and access to an extensive range of investment classes including shares, bonds, traditional authorised funds, ETFs and alternative investments.

The core operating system is provided by Australian based InfoComp who have been developing software solutions for fund administration and financial services since 1996, and for wrap solutions since 1999, amassing \$186bn (AU) in assets under management on their systems. The comprehensive suite of portfolio management tools is powered by Financial Express, who also provide the data for the platform, and the illustrations are provided by Dunstan Thomas.

The Novia team, based in Bath, is led by Bill Vasilieff, ex Sales and Marketing director and joint Co-founder of Selestia. Novia, as an independent proposition, has substantial financial backing from a combination of private individuals and corporate organisations. The board is chaired by Sir Anthony Cleaver (former chairman and chief executive of IBM in the UK). Other members include John Beaumont, non executive, who has held a number of non executive roles in major public organisations and several technology startups, Tim Levy (non executive and investor), Chief Executive of Future Capital Partners, David Royds (non executive and investor) Chairman of Matrix group, and Bill Vasilieff as CEO.

Novia Financial plc is authorised and regulated by the Financial Services Authority.

Stonewater Wealth Management

Stonewater Wealth Management Ltd is a privately owned company based in Tarleton, Lancashire.

A fundamental principle of our practice is a "team" based approach. We believe that no one person is able to be an expert in all aspects of our profession and each of our advisers has his or her own specialisms. Where we do not have the in-house expertise we need, we liaise and work with other professionals in their chosen fields.

We embrace the ideals of service, quality and efficiency with over 80 years of collective experience. We offer fee based and commission based advice, as well as a fee based Client Care Programme.

Stonewater Wealth Management is relatively unique in the sense that we offer a defined investment philosophy and investment approach. We believe that the preservation of wealth is not just about one month, six months or even one year's investment returns, or indeed

next year's in isolation – it is about consistently delivering above average returns over the medium to long-term.

We offer advice in a wide range of areas, including Pensions, Investments, Inheritance Tax Planning, Life/Critical Illness Insurance and Mortgages. We are also pleased to offer impartial advice on those policies not currently serviced by us.