

## CISCO DELIVERS FINANCIAL SERVICES SECURITY STANDARD TO LEADING UK PENSION ADMINISTRATOR

**AJ Bell, one of the UK’s leading administrators of self invested pension schemes, has deployed Cisco network security technology that has enabled the company to introduce e-business products, manage rapid expansion and meet rigorous security standards expected in the financial services industry.**



### Security risk for e-business strategy

AJ Bell Group is a financial services company providing pension administration services for Small Self Administered Schemes (SSAS) and Self Invested Personal Pensions (SIPP). The company, which is the UK’s third largest SIPP operator, is based in Manchester and has over 160 staff. The value of assets under the company’s trusteeship exceeds £3 billion.

Traditionally, the company has provided its services to high net worth clients. A SSAS or SIPP can involve the purchase of property, stocks and shares and Government Bonds amongst other things as an investment towards a pension. Because the rules and regulations around these schemes are complex, they need to be professionally administered. However, in 2000 the company launched Sippdeal, the UK’s first online SIPP, which enables customers to buy and sell shares online as part of their own pension fund investments. AJ Bell has subsequently launched a version of Sippdeal for independent financial advisers (IFAs) called SIPPcentre.

Ian Coulson, IT director at AJ Bell, says, “Sippdeal was part of our business strategy to make our products and services available online, making them more accessible and with reduced fees, to people who could not normally afford such schemes.” Increasingly, AJ Bell is relying more and more on online products and electronic communications.

One of the issues that an e-business strategy posed was ensuring that the information communicated electronically was secure, since highly sensitive personal and financial information is exchanged between AJ Bell and its customers over the Internet. AJ Bell’s communications and information infrastructure has to match rigorous security standards expected of an FSA-regulated organisation.

In addition to the need for a strong security capability, another challenge for AJ Bell’s communications infrastructure was the company’s rapid growth. Over the last few years the company has been doubling in size approximately every two years and revenues have been increasing which meant its network requirements were constantly changing.

### EXECUTIVE SUMMARY

**CUSTOMER NAME**

- AJ Bell Group

**INDUSTRY**

- Financial Services

**BUSINESS SIZE**

- Small & Medium Business

**BUSINESS CHALLENGE**

- Meet rigorous security standards expected in the financial services industry
- Rapid business and organisational growth
- Shift from traditional towards e-business service provision

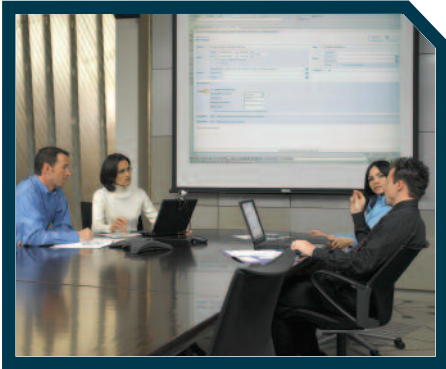
**NETWORK SOLUTION**

- Cisco Foundation Network with integrated security

**BUSINESS VALUE**

- Meets FSA-standards for communications and data security
- Enables introduction and management of e-business products and services
- Provides high-level security, but maintains openness and flexibility
- Helps the business win an industry award

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### Cisco technology addresses rapid business expansion

Since its foundation in 1995, AJ Bell has used Cisco technology for its Local Area Network (LAN) at its Manchester office as well as Cisco security technology. The Cisco network security solution comprises the Cisco PIX firewall platform which covers five critical areas in ensuring network security: identity, perimeter security, secure connectivity, security monitoring and security policy management. Coulson says, “Security is paramount given the kind of financial information we are handling and the Cisco technology, especially its security capabilities, helps us achieve the levels of network protection we need. When we started out we were a small, but rapidly expanding company and we couldn’t easily predict the rate of our growth. But choosing Cisco meant we didn’t have to purchase high-end technology straight away because it has expanded and evolved as our business has changed.”

Coulson says that the Cisco security architecture enables AJ Bell to segregate various parts of the network so that different security levels can be applied depending upon the nature of the information. One of the big advantages of this is the ability to run several information networks over a single network infrastructure. Cisco Virtual Private Network (VPN) technology also supports laptops used by AJ Bell staff to access company information securely while they are away from the office.

The solution at AJ Bell was implemented by JMC.IT, a Cisco Premier Partner. JMC IT is a leading supplier of IT systems and solutions to small and medium sized organisations throughout the North of England. JMC.IT offers a comprehensive portfolio of technology, software and service and acts as a single source for all IT project and support requirements.

### Cisco helps win industry award

AJ Bell service levels and innovation have recently won the company a prestigious pension administrator of year award and more awards have followed. Coulson says, “Without a communications infrastructure that’s both flexible and secure, our staff can’t access the information they need to provide a high level of service to our customers. Part of winning the award is to do with the level of service we offer. AJ Bell can only offer that service if our administrators have access to the information they need, when they need it and that’s based upon the Cisco infrastructure.”

Coulson adds that it would have to been difficult to develop its online products without the infrastructure and security that Cisco technology offers. “Using Cisco technology and the scalability and flexibility it provides just makes the job of communications and network security so much easier. It’s the features and continuity across the range whether you’re going from a firewall, to a switch, to a router, they all work seamlessly together with security common to all aspects. Cisco also offers devices all across the range from small company to enterprise,” says Coulson.

Coulson says that despite having a strong security policy for its network, this has not impeded performance or access to information. For example, having separate networks for production and development means that neither network slows up the performance of the other. This also means that even from a low performance remote connection, such as a home dial-up, staff can still access the information they need without long delays.

AJ Bell has always found that the Cisco equipment to be very reliable. In fact, AJ Bell has never had to call on Cisco support because of a technical fault.

AJ Bell continues to expand its business, particularly its e-business capability. Coulson says, “We started with Cisco, we’ve grown with Cisco and we’ve had no problems, so there’s absolutely no reason to change. And as we grow in the future the Cisco technology is there to grow with us.”

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**Ian Coulson**  
IT Director  
AJ Bell

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