

## **M&G Wealth appoints Lisa Worley as Chief Marketing Officer**

**13 June 2024** – M&G Wealth today announces the appointment of Lisa Worley as Chief Marketing Officer. With over two decades of strategic and creative marketing experience transforming brands across the wealth and investment management sector, Lisa brings extensive experience to the role.

Lisa will be responsible for marketing, propositions and insights for M&G Wealth, including positioning for the UK retail market and end-to-end adviser and customer journeys. She will drive strategic marketing, as well as work to enhance the adviser and customer experience, enabling M&G's ambition to become a leading wealth business in the UK.

Most recently Lisa was Chief Marketing Officer at financial technology provider Asurafin. Prior to this Lisa was Group Head of Marketing at Embark, part of the Lloyds Banking Group, responsible for a portfolio of brands providing platform, investment and retirement solutions.

Lisa will report to CEO Caroline Connellan and join M&G Wealth's executive leadership team.

**Caroline Connellan, CEO at M&G Wealth said:** "I'm delighted to welcome Lisa to M&G Wealth. Her deep experience in helping businesses increase their market presence, drive sustainable growth and transform adviser and customer experiences will be invaluable in building the M&G Wealth brand, so it's known for superior advice and helping customers achieve their financial goals.

"I am confident that Lisa's experience, energy and drive will be instrumental in helping us to champion advice and advisers as we establish ourselves as a leading Wealth business in the UK."

**Lisa Worley, incoming Chief Marketing Officer of M&G Wealth said:** "I'm excited to be joining M&G Wealth at a pivotal moment in its next stage of growth. With deep investment expertise and more than 175 years of experience in helping people manage and grow their wealth, M&G is in a strong position to support the UK wealth market - and the millions of adults who could benefit from financial advice but are not currently receiving it. As one of the largest advice businesses in the UK, with a market-leading adviser academy and unrivalled distribution footprint, M&G Wealth is well-placed to help individuals achieve a financially secure future.

"I am really looking forward to working with Caroline and the M&G Wealth team to shape the business for the future, expanding our range of compelling products and services, and growing and strengthening our relationships with advisers and customers."

-ENDS-

### **Media enquires**

Louise Bryans

[louise.bryans@mandg.com](mailto:louise.bryans@mandg.com)

07733315139

### **Notes to editors**

1. Photo of Lisa Worley available on request
2. Lisa Worley joins M&G Wealth on 17 June 2024.

### **3. Lisa Worley Biography**

#### **Asurafin – 2022-2024**

Chief Marketing Officer

#### **Embark Group (Lloyds Banking Group) – 2019-2022**

Group Head of Marketing

#### **Consultant – 2017-2019**

Marketing, brand and business development strategy

#### **Ashurst – 2015-2016**

Chief Marketing Officer

#### **Barclays – 2007-2015**

Managing Director, Customer Engagement, Direct Investing – 2014-2015

Global Head of Marketing, Wealth and Investment Management – 2010-2014

Chief Operating Officer, Global Marketing – 2007-2010

#### **EY – 1993-2007**

Head of Marketing, UK & Ireland – 2006-2007

EMEA Head of Industry Services, Technology, Media and Telecoms 2005-2006

Various marketing and business development roles – 1993-2005

### **About M&G Wealth**

We believe wealth is more than money. It's not just what you have, but what you can do with it. It's choice, knowledge, peace of mind and doing the right thing by you, for those we love and the world we all share.

Together, we're working towards strengthening what we have. And, building something we believe is new and unique; a multi-channel offering that is advice-driven, tech-enabled and sustainability-led; a long-term savings and investment powerhouse with the reach and resources to help people manage and grow their savings responsibly.

### **About M&G plc**

M&G plc is an international savings and investments business, managing money for more than 4.6 million individual customers and more than 900 institutional clients from 38 offices worldwide. As at 31 December 2023, we had £343.5 billion of assets under management and administration.

With a heritage dating back more than 170 years, M&G plc has a long history of innovation in savings and investments, combining asset management and insurance expertise to offer a wide range of solutions. We serve our retail and savings customers under the M&G Wealth and Prudential brands in the UK and Europe, and under the M&G Investments brand for asset management clients globally.