



22 January 2025

Jonathan Gunby to retire as Transact CEO and handover the CEO role to Tom Dunbar

As part of a planned succession programme, Jonathan Gunby will retire from the business in March 2025 and Tom Dunbar will take over as CEO of Integrated Financial Arrangements Ltd the operator of the Transact platform.

Jonathan joined the business in 2011 when Transact's Funds under Direction were £10bn. Although Jonathan always says that the hardest work - establishing Transact - had been done by 2011, he has been part of a core team who have grown the business to over £65bn of FUD. Jonathan was also a key member of the small team who floated the holding company in 2018 and was a director of the listed entity IntegraFin Holdings plc until he retired from that board at the end of the 2024 financial year. After forty years working in financial services and at age 65, he and his wife are looking forward to spending more time on the beach.

Jonathan recruited Tom as Chief Development Office in April 2021 as his potential successor. After a successful initial period, during which Transact has continued to prosper under his guidance Tom was appointed to the Transact board in April 2023 and the board is now delighted to appoint him as CEO following a well-executed succession plan.

The Gunby family continue to be IHP shareholders and Jonathan remains available to provide on-going support to the business.

Jonathan Gunby says:

"I have thoroughly enjoyed being part of the Transact success story and wish colleagues, advisers, and customers all the absolute best for the future. Tom has excelled in his role at Transact and I'm entirely confident that I am leaving Transact in extremely capable hands."

Richard Cranfield, chair of IHP Group says:

"We thank Jonathan for his dedication to and hard work in the business and through his board contributions. He has delivered material and profitable growth for the business during his tenure, navigating significant political and economic change, alongside the impacts of the pandemic and a highly competitive platform market. We wish Jonathan and his wife Cheryl all the best in retirement."

Tom has impressed me and the other board members. We are delighted to appoint Tom as CEO and wish him every success in his new role.”

Notes:

Transact is the trading style of the investment platform operated by Integrated Financial Arrangements Ltd.

Tom joined Transact in 2021 as Chief Development Officer responsible for sales, marketing, change and client operations. Tom joined the IFAL board in 2023 and became Deputy CEO in 2024. He has worked closely with Jonathan Gunby the retiring Transact CEO for the past 4 years.

Tom joined NMG Consulting in 2008 and became a Partner in 2014. He advised platforms, fund managers and life insurers on portfolio and competitive strategy in the UK and globally. Tom then joined Royal London as Group Strategy Director in 2017 and then RLI Distribution Director in 2019. In 2021 he joined Transact.



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