

# Investment Consulting

## Who is this for?

Clients that want an enhanced approach to traditional investment consulting, which is delivered via a personal, “engaged partner” approach.

## What does it offer?

It allows trustees access to our full modelling capabilities and ensures our best ideas are presented to them. The detailed monitoring reports and regular access to our consultants means that ‘strategy and performance’ is continually being reviewed and proactive advice can be readily implemented. This service allows for a dynamic working relationship between the Client and the Investment Consultant and results in an “engaged partner” working relationship. Our Investment Consulting service utilises an implementation solution, where our preferred provider is currently Mobius Life.



### Strategy – regular review using best ideas

- A **full** triennial asset liability modelling exercise combining:
  - Stochastic projections of current and proposed asset allocations using most asset classes.
  - Deterministic scenario testing of current and proposed asset allocations using our iSite model.
  - Cash flow requirements.
- Proactive strategy advice as the funding level develops.

### Implementation – best, efficient ideas

- Tailored recommendations of fund manager combinations from our core list.
- Use of an implementation solution, currently Mobius Life, facilitating all transitions and increasing manager diversification.
- Monitoring of the selected managers.

### Reporting - level determined by trustees

- Attendance by an Investment Consultant at either two or four trustee meetings per annum.
- Detailed **quarterly** investment reports focusing on the economic environment and fund managers’ performance.
- **Quarterly** funding level tracking.

### Compliance & Governance - proactive advice

- Maintenance of the Statement of Investment Principles.
- Myners Compliance Statement.
- Annual investment trustee training meeting and focused decision making.

We structure our solutions to ensure there are no unexpected fees and our triennial asset liability modelling costs are spread over three years.

## Our contact details

Should you wish to discuss these services then we would be very pleased to meet you.

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### Cardiff

**Robert Davies**

Partner

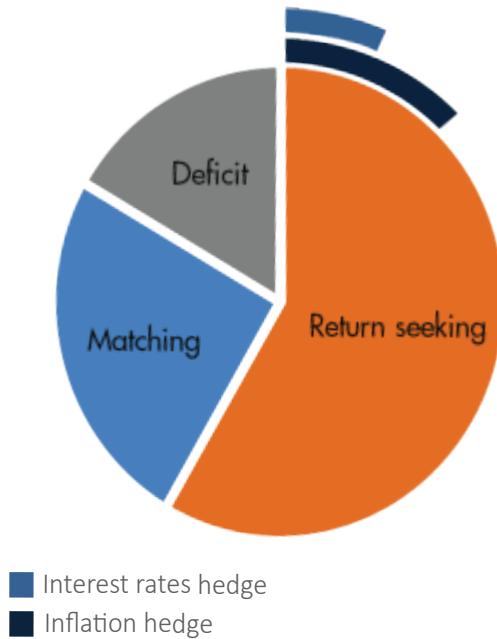
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This solution will help you to:

## Get the strategy right.

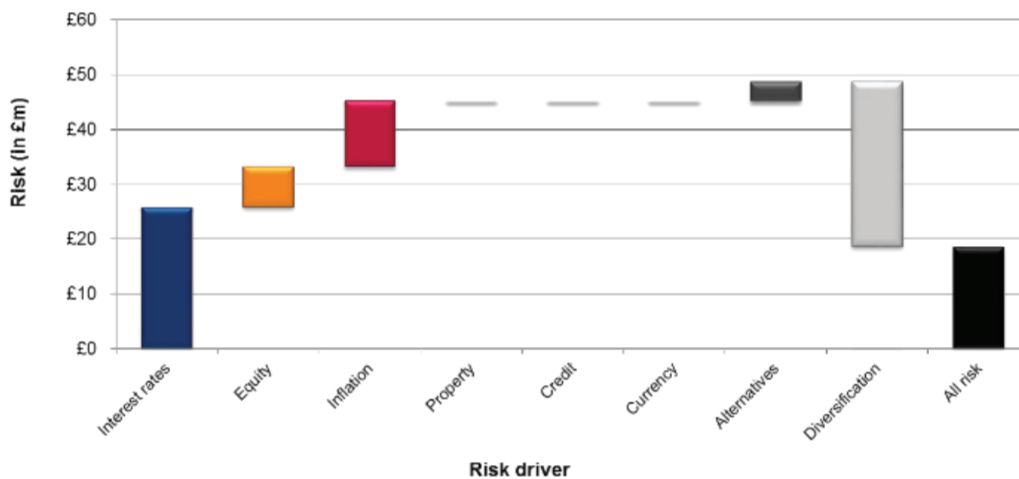
Benchmark portfolio - Current strategy



Our iSite modelling tool graphically highlights investment details

## Know where your risks lie.

**Current portfolio**  
1 year risk decomposition of change in deficit at 5% confidence level



These graphics are for illustration only.