

# Sponsor Oriented Funding & Investment Advice

## Who is this for?

SOFIA is for busy sponsor personnel who can ill-afford to be out of the pensions loop but who have neither the time nor inclination to be directly involved.

Increasingly, senior executives and directors are backing away from the Pension Trustee Boardroom. Whilst this makes sense, complete absolution of responsibility is dangerous and, for some, a dereliction of duty.

## What does it offer?

The clue is in the name. SOFIA offers relevant, independent, strategic advice to pension scheme sponsors on those issues that matter most - the level and timing of contributions and the investment strategy that goes with them.

## Is it really necessary?

The Pensions Act requirements for consultation mean that scheme sponsors still hold meaningful influence over pension governance. This is particularly true as trustees have grown to realise that a thriving sponsor can be the scheme's best friend!

Further impetus has recently come with the Pensions Regulator's guidance on integrating risk management. This encourages trustees to "engage with the sponsoring employer to develop a common understanding of the relationships between (investment and funding) risks in order to maintain a balance...which is sustainable for both the scheme and employer".

## What's different about SOFIA?

The service recognises the busy schedule of senior executives and provides trusted adviser support in the following ways:

- clear remit: a well-honed empathy with the sponsor's perspective
- disciplined prioritisation: a profound understanding of what really matters and what can be side-lined
- emphasis on strategy: with the Trustees managing the detail
- quarterly meetings and efficient reporting: our A4 Briefings get straight to the heart of the matter, using the well-worn SCRAP formula (situation, considerations, recommendation, action, plan)

*"You can do anything - but not everything" - Dave Allen, Author: Getting Things Done*

*"If I had more time I'd have written you a short one" - Mark Twain and others*



## Our contact details

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

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## Other Quantum Advisory investment services

Further information about Quantum's investment services can be found at the following <http://quantumadvisory.co.uk/trustee-services/investment/>

### Investment Consulting

An enhanced approach to traditional consulting, delivering clear guidance using leading edge modelling and research ideas, via a personal, engaged-partner approach.

### Fiduciary Consulting

Our premium service for trustees intent on managing assets and liabilities proactively, on a continuous basis, using all our available consulting solutions.

### Fiduciary Manager Governance

An independent and informed approach to third-party fiduciary manager procurement, plus ongoing monitoring and management of the value that such managers add.