

INVESTMENT OPTIONS REVIEW

THE ANALYSIS AND REPORT

Periodic review of the investment options available to members of a Defined Contribution scheme ensures that the options remain appropriate for members and reflect changing market practices and legislation. This includes the funds, any lifestyle strategies and most importantly the default strategy (where the majority of members are typically invested).

The investment options review would consider and make recommendations in the following areas.

- Members needs
- Members' reasonable preferences
- Optimum number of funds in range
- Suitable investment options not represented in the fund range
- Inclusion of Environmental Social and Governance Factors including climate change
- Performance review
- Lifestyle options
- Default options

WHO WOULD FIND THIS SERVICE USEFUL?

- Trustees of Defined Contribution ("Money Purchase") pension schemes
- Employers with Defined Contribution pension schemes

HOW LONG DOES THIS PROCESS TAKE?

The length of time taken will depend on the size and complexity of the scheme to be reviewed. At the time of an enquiry a timescale will be mutually agreed.

CHARGES

The cost of the service is calculated on a time-spent basis and will depend upon your specific needs.

BWCI GROUP

The BWCI Group is the largest group of actuaries and consultants in the Channel Islands, with offices in both Guernsey and Jersey. It is a member of Abelica Global, the international network of leading independent actuarial consulting firms.

FURTHER INFORMATION

For further information on this and other investment services provided by the BWCI Group please contact invservices@bwcigroup.com, or visit our website at www.bwcigroup.com.



Focused

We are focused on our clients' needs and provide a service to suit their individual requirements.

Practical

We deliver solutions in practical, commercial and cost-effective ways.

Innovative

We seek innovative solutions to complex financial problems using advanced analytical tools and software.

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