

APPOINTMENT OF AN INVESTMENT MANAGER



THE APPOINTMENT PROCESS

The appointment of an investment manager is a process with a number of clearly-defined stages.

- Analysis of investment requirements
- Investment strategy review, including performance objectives
- An invitation to tender followed by a review of proposed investment managers
- Arrangement of a Beauty Parade for a short list of investment managers
- Review of Investment Management Agreement

The process tends to vary by client and may exclude certain sections or have some other tailoring appropriate to the client's needs.

Each of these services is provided by BWCI, and has its own fact sheet. The full review and appointment of an investment manager links these services, in a suitable fashion for the client.

WHO WOULD FIND THIS SERVICE USEFUL?

- Trustees of Defined Contribution ("Money Purchase") pension schemes
- Trustees of Defined Benefit ("Final Salary") pension schemes
- Captive insurance companies
- Insurance and life assurance companies
- Trustees of charitable trusts
- Corporate Trustees

HOW LONG DOES THIS PROCESS TAKE?

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

CHARGES

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

BWCI GROUP

Established in 1979 the BWCI Group is the largest group of actuaries and consultants in the Channel Islands with over 100 staff encompassing a wide range of disciplines.

The BWCI Group is a member of Abelica Global, the international network of leading independent actuarial 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

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

Practical

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

Innovative

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

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