

THE SERVICE

We provide a range of training in investment issues for trustees. We aim to deliver these open courses once a year and make them available to all trustees who may be interested.

The objective is to introduce topics and concepts that may be new to some trustees whilst ensuring there is sufficient detail to keep the presentation of benefit as a refresher to trustees with prior knowledge of the subject matter.

The presentations are primarily aimed at trustees of pension schemes and separate presentations are made for Defined Benefit and Defined Contribution types of scheme. Areas typically covered include:

- Introduction to major asset classes
- Overview of recent legislation and best practice
- Asset allocation and benchmarking
- Selecting an investment manager and monitoring performance
- Suitable investment options for members of DC schemes
- Selection of a suitable range of unit funds

In addition to these open sessions we can run a bespoke course tailored to deliver training to your requirements.

WHO WOULD FIND THIS SERVICE USEFUL?

- Trustees of Defined Contribution ("Money Purchase") pension schemes
- Trustees of Defined Benefit ("Final Salary") pension schemes

HOW LONG ARE THE PRESENTATIONS?

The presentations are generally half a day in length and held in the morning. Presentations are made at our offices in Guernsey and Jersey.

CHARGES

The cost for attendance at a presentation is determined in advance of each event. For bespoke training the charge will depend on the service provided.

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.

Location	PO Box 68, Albert House South Esplanade, St Peter Port Guernsey, GY1 3BY
Tel	+44 (0)1481 728432
Fax	+44 (0)1481 724082
Web	www.bwcigroup.com

Location	Kingsgate House, 55 Esplanade, St Helier Jersey, JE2 3QB
Tel	+44 (0)1534 880112
Fax	+44 (0)1534 880113
Web	www.bwcigroup.com