

REVIEW OF PROPOSED INVESTMENT MANAGERS



THE REVIEW REPORT

This report examines prospective managers for your investment arrangements. Each of the managers is provided with a briefing note and asked to complete an in-depth questionnaire.

The results of the questionnaire responses and further research form the basis for the report. Key areas of importance are identified for the client, and each of the managers is ranked in these areas.

A proposed short list concludes the report's recommendations. The report would normally address the following:

- Thumbnail profile of each manager
- Products
- Investment philosophy and process
- Experience and quality of personnel
- Investment track record
- Fees
- Range and quality of service

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 fund 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.

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