

# REVIEW OF PROPOSED INVESTMENT MANAGERS



## THE REVIEW REPORT

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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?

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- 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?

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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

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

## BWCI GROUP

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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

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For further information on this and other investment services provided by the BWCI Group please contact [invservices@bwcigroup.com](mailto:invservices@bwcigroup.com), or visit our website at [www.bwcigroup.com](http://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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