

# REVIEW OF AN INVESTMENT FUNCTION



## THE REVIEW

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If you have an in-house investment management function, or perhaps have investment management functions provided by a sister company within a group, there are good governance reasons to have an external review of the operation of that function.

When conducting such a review we can consider particular areas of interest, which you have identified, or we can perform a more general review, which would normally cover the following:

- Structure
- Resources
- Personnel
- Philosophy and processes
- Products
- Risk
- Performance
- Fees and expenses

## 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
- Employers with pension schemes
- Insurance and life assurance companies
- Trustees of charitable trusts

## HOW LONG DOES THIS PROCESS TAKE?

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The length of time taken will depend on the size and complexity of the structure 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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