



## Independent, uncompromised, trusted investment advice

Our huge breadth and depth of experience, integrated into a unique business model, means you can be assured you are receiving the best possible customised advice from your AllenbridgeEpic named adviser

### Key areas where we can help:

AllenbridgeEpic Investment Advisers (AllenbridgeEpic) will provide you with pro-active assistance on all investment matters, and practical advice tailored to your scheme's requirements. This helps your trustees reach informed decisions for the benefit of scheme members, including, for example:

- **Developing and reviewing investment policy**
- **Assisting with long term strategy and benchmarking (including challenging the input from the actuary and sponsor)**
- **Informing discussion and assisting with technical concepts**
- **Input into asset allocation decisions**
- **Constructive monitoring, review and selection of investment managers**
- **Assisting trustees with independent oversight of a fiduciary manager or implemented consulting provider**
- **Improving trustee governance and conduct of best practice, including Myners Principles and policies on responsible investing**
- **Reviewing and monitoring the scheme's Statement of Investment Principles (SIP)**
- **Providing general or tailored trustee training courses**

### Governance advice

Good governance, done well, adds value. We can help you achieve good standards of governance in all investment related areas. In particular, we provide a specialist governance advisory service for local government schemes which need to comply with The Department for Communities & Local Government regulations.

### Costing certainty

AllenbridgeEpic does not charge on the basis of fund value or on an open ended time basis. Instead we charge on the basis of fixed fees (backed up by a clear scope of work) both for our full investment advisory service and for ad-hoc project work. There is no 'ticking clock'.

**AllenbridgeEpic**  
investment advisers

This document is directed at professional investors only and is issued by AllenbridgeEpic Investment Advisers Limited, an appointed representative of Allenbridge Capital Limited which is Authorised and Regulated by the Financial Conduct Authority.

AllenbridgeEpic Investment Advisers Limited is a subsidiary of Allenbridge Investment Solutions LLP.

# Effective decision-making encompassing expert investment advice

“ We have a distinctive business model that has allowed us to attract exceptional individuals from the pensions and investment industries. Above all, we value the independence of our advisers; we provide advisory services and solutions to our clients. We do not sell products. Our clients all receive an expert investment senior adviser, who is also able to draw on the collective wisdom and practical experience of a team of industry professionals. ”

Odi Lahav - CEO

## **The expert advice that we provide makes it possible for your trustee body to exhibit tangible examples of best practice in decision-making.**

AllenbridgeEpic advisers have all held senior positions in the investment and pension fund industry. Many of our advisers are well-known industry figures, having worked for some of the UK's largest pension schemes. A number of advisers were investment managers and have hands-on practical experience of investing for pension schemes. Your chosen adviser will provide you with practical, in-depth knowledge and experience of all aspects of the management of your pension assets, by accessing this expertise available within the AllenbridgeEpic group.

A distinctive characteristic of our service is a truly unbiased view. Our focus is purely on investment related issues and the provision of investment advice. We don't offer administrative, actuarial or HR services.

Our advisers provide you with independent advice. They operate within a collegiate framework formulating the best advice for your fund, based on their own expertise and experience, but supported by a peer group exchange of ideas and information at monthly meetings.

## **AllenbridgeEpic advisers provide personalised and expert opinion supported by a high calibre, experienced team.**

You also have the reassurance that all our client-facing advisers are Financial Conduct Authority Approved Persons. Your adviser comes to you with professional indemnity insurance and is dedicated to your fund.

## **At AllenbridgeEpic our clients' interests are paramount.**

We have what we believe is a unique business model in the investment advisory industry.

Instead of being set target income levels to generate from clients, our advisers specify the number of clients they are comfortable and best able to work with. This low client/adviser ratio not only allows AllenbridgeEpic advisers to maintain their enthusiasm and capacity for client work, but it ensures that our clients' interests remain paramount.

Our advisers come to this role after many years in the investment, pensions and charities fields with the express intention of concentrating on what they enjoy most - working directly with clients to provide the best advice possible. We want to be here and we want to work with you. Our business growth is based on 'word of mouth' recommendation and growing with clients, not at your expense.

You are provided with a dedicated named adviser and an experienced named senior alternate who can step in, should that ever be necessary.

# AllenbridgeEpic

investment advisers

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## **AFFORDABLE CONSULTANCY**

At AllenbridgeEpic we charge fixed fees. Everything is clearly costed before you commit to our advisory service. You can buy as much or as little as you require. But you can be sure you're unlikely to receive such excellent value for money from any other adviser.

## **EXPERT OPINION**

At AllenbridgeEpic you will find the widest range of expertise on tap: advisers who have worked both in the investment and pension fund arenas. All have distinguished, enviable track records and you'll be unlikely to get such expert advice anywhere else.

## **INDEPENDENT THINKING**

At AllenbridgeEpic we strive to formulate the best advice for clients in a truly independent fashion. The advice you'll receive will be genuinely tailored to your specific requirements and free of 'house view' syndrome.

## **ACTIONABLE OUTCOMES**

At AllenbridgeEpic we won't leave you feeling 'what, exactly, did I pay my adviser for?' Our objective is to deliver a clear step-by-step set of 'actionable outcomes' - in response to your objectives - ensuring you know the results of any recommendation.