



Manager selection

- tailored manager selection specialists; a totally independent approach

Our manager selection service uses highly experienced professionals.

The Senior Advisers allocated to your manager selection project bring all the relevant expertise required to fulfil it, including experience of manager selection work, the particular asset class concerned and the procedures that need to be followed.

Typically two or three Senior Advisers will be directly involved; this core team will also be able to call upon the wider knowledge base of their AllenbridgeEpic colleagues as required.

The summary on the right provides the scope of our tailored selection process.

Price guarantee

We deliver excellent value for money because our cost base is kept as low as possible. Our advisers work remotely, coming together for meetings as appropriate. You pay for their time and expertise, not for expensive office space. We charge fixed fees, negotiated in advance, with no hidden extras.

Next steps

To discuss the challenges facing your pension fund, and learn how our manager selection service may be of help, please contact:

Philip Hebson or Odi Lahav on +44 20 7079 1000
or email philip.hebson@allenbridgeepic.com
odi.lahav@allenbridgeepic.com

AllenbridgeEpic prepares all manager selection proposals in a bespoke manner to ensure that we correctly match our service to your specific requirements. We do not have preferred investment managers or buy lists. This means our selection process is without bias and is focused entirely on your needs.

In particular:

- We are experienced in running OJEU compliant manager selection searches and can advise on all aspects of the process
- For corporate pension schemes and LGPS funds wishing to make manager selections outside of the OJEU procedures we can offer a service that matches your own procurement process
- We will provide a progression timetable, tailored to your requirements. This will cover meetings with your pension team including the fund Trustees or Members and any requisite deadlines
- Full written reports will be provided at each stage of the process, clearly structured for ease of use
- Because we do not use a prescribed process, we can involve you in our work as much as you would like - for example, if you wish to learn about manager selection as part of your Continuing Professional Development (CPD) we are able to facilitate that
- We can provide due diligence services as part of the final manager selection procedure
- When appropriate we can advise on transition arrangements from existing managers to the newly appointed manager

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

T: +44 20 7079 1000 E: info@allenbridgeepic.com W: www.allenbridgeepic.com

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.