



# PensionFocus™

- a distinctive service  
for corporate  
pension schemes

Trying to identify talented investment advisers for your investment committee?  
Seeking to improve the governance of your pension scheme?  
Feeling frustrated by 'off-the-shelf' advice provided by large consultancies?

**Our distinctive PensionFocus™ investment advisory service for corporate pension schemes may be the answer.**

Through delivering PensionFocus™ to corporate pension schemes, we understand the importance of 'fitting' our service to each fund's specific needs.

Our advisers are respected and appreciated...

*"Karen, thank you for suggesting Alick Stevenson, he was a perfect fit for what we wanted. Alick had just the right mix of experience and wisdom of this task. Alick did just what we wanted, working with an ill-defined brief and people trying to do a day job as well as being pension trustees. As trustees, we come away as sure as we can be that we made the right choice, there were no gaps in the offering being proposed and that there are no other practical options we should have considered."*  
**Clive King, Sun Microsystems**

#### 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 offices. We charge fixed fees, negotiated in advance, with no hidden extras.

We fully respect the need for confidentiality and are happy to sign confidentiality clauses, as required by you. The summary on the right gives a flavour of PensionFocus™.

#### Next steps

In keeping with our tailored approach, we would like to arrange to visit you, at your convenience, to discuss the challenges facing your pension fund, and to explain how AllenbridgeEpic's PensionFocus™ advisory service might be of help.

For more information please contact us on  
**+44 20 7079 1000 or [info@allenbridgeepic.com](mailto:info@allenbridgeepic.com)**

Our PensionFocus™ advisory service for corporate pension schemes includes:

- **High calibre, seasoned industry experts**  
- our advisers have many years' experience and an excellent reputation in the market; there are no juniors on our team.
- **An individual relationship with your adviser**  
- we recognise that, at a senior level, a strong 1:1 relationship with your adviser is crucial. Whilst we do provide named alternates in the event of an emergency, we do not expect you to speak to a different person every time you call.
- **Wide-ranging expertise**  
- our advisory team has a wide range of skills. Whether you require a capability in alternatives, input on governance, or advice on traditional asset classes, we can direct you towards an individual who has the necessary experience and talent.
- **Genuine independence and specialist focus**  
- our focus is exclusively on investment advice. Because we don't offer other services, you can be sure the advice we provide is unencumbered and genuinely focused on your needs and challenges.
- **The advice you need when you need it**  
- we understand that the type and format of advice you require will vary over time, from ongoing support to individual projects or simply giving a second opinion on advice you've received from elsewhere. Our aim is to develop a partner-style relationship where you can discuss your issues openly with us and in complete confidence.

# 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.

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investment advisers

T: +44 20 7079 1000 E: [info@allenbridgeepic.com](mailto:info@allenbridgeepic.com) W: [www.allenbridgeepic.com](http://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 very sure you are 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 prime 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.