



# Investment and governance advice for Scotland

**AllenbridgeEpic in Scotland has a dedicated team that is experienced in the different regulatory and governance requirements that prevail for pension funds in Scotland.**

**We also appreciate the historical differences that are a feature of many schemes, setting them apart from their English and Welsh equivalents.**



Tim McKay

The team is led by Tim McKay (former Chair of Lothian Pension Trustees), who has extensive experience of the pensions world in Scotland. He is assisted by Alastair Haddow and Grant Ballantine.



Alastair Haddow

Philip Hebson, Odi Lahav and Anthony Yadgaroff - complete the AllenbridgeEpic in Scotland team.



Grant Ballantine

The AllenbridgeEpic in Scotland team is able to provide you with pro-active assistance on all investment matters and practical advice tailored to your scheme's requirements, thus ensuring your trustees reach informed decisions for the benefit of scheme members.

## **Our service for Scottish Funds includes:**

- 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

**AllenbridgeEpic**  
investment advisers

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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

## About AllenbridgeEpic Investment Advisers

AllenbridgeEpic, a subsidiary of Allenbridge Investment Solutions LLP, is a genuinely independent pension fund advisory group that provides first class independent investment advice to Local Government Pension Schemes, trustees of corporate pension schemes, employers and charities.

Our high calibre advisory team bring many years of hands-on experience in managing and advising on complex investment issues. As well as working on low client-adviser ratios, thereby ensuring our clients' interests remain paramount, our client-facing advisers are Financial Conduct Authority Approved Persons, have professional indemnity insurance and charge fixed fees.

## About Tim McKay

Tim McKay is spearheading our AllenbridgeEpic in Scotland service, with support from Alastair Haddow, Grant Ballantine, Philip Hebson, Odi Lahav and Anthony Yadgaroff.

Tim qualified as an accountant with Coopers & Lybrand in 1984 and has since worked in a variety of Financial Services positions, most recently as Chair of Lothian Pension Trustees which has nearly £4bn of assets across three defined benefit schemes and nearly 100 charitable funds. During the same period Tim was Vice Convener of Economic Development for the City of Edinburgh Council and a director of the City's property development company.

During his career Tim has provided advice to a wide variety of large UK pension schemes, both in the public and private sectors. He was also for a while Head of Accounting and Finance at Napier University and has lectured in Finance and Investment in the UK, Europe, Cayman Islands, Australia, Singapore, Hong Kong and mainland China.

Tim is a member of the CFA Society of the UK and a Fellow of the Institute of Chartered Accountants in England and Wales.

## For further information please contact

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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 the results of any recommendation is known.