



# Where do you turn for effective fiduciary oversight?

**Puzzled by the welter of options available?**

**In need of independent fiduciary oversight and guidance?**

**Then AllenbridgeEpic can help.**

## **Fiduciary management - the issues**

“Fiduciary management”, “implemented consulting”, “delegated consulting” and “solvency management” are all terms that consultants and asset managers use to describe the pension industry’s trend toward outsourcing more and more fiduciary responsibilities.

While this approach can provide you with a ‘one stop’ solution to governance challenges - from responding quickly and expertly in increasingly volatile markets to freeing up your time to focus on the most strategic governance issues such as objective setting and risk budgeting - it also brings unique challenges. For example, you have to place a significant degree of trust in the capacity and capability of your appointed manager and actively monitor their progress, while also retaining your own fiduciary responsibilities.

## **AllenbridgeEpic’s specialist fiduciary oversight service**

As a genuinely independent pension fund advisory group with **no** fiduciary offering of our own, AllenbridgeEpic is in a **unique position** to offer you an expert fiduciary oversight service.

By acting as an essential bridge between you and your delegated manager, we can give you greater confidence when implementing strategic decisions and help you monitor the outcomes more effectively.

## **Fees**

We charge a fixed fee for the core service, with additional services provided at our standard per diem rate.

## **Our core service includes:**

- A named independent adviser - backed by our broader team of experts - to help you manage the delegated relationship and oversee its effectiveness in practice
- Independent assessment of the advice you receive when setting your risk budget
- Help setting suitable fee scales, objectives and parameters for your fiduciary manager, so you can be sure you’re measuring performance accurately
- Ongoing evaluation of the appointed manager; including your named adviser attending meetings
- Independent oversight of the de-risking process and factors which may affect the flight-path of your pension scheme
- Attendance at quarterly trustee meetings

## **In addition to our core service we can also provide:**

- Unconflicted advice on whether a delegated approach is actually suitable for your fund, prior to you making your decision
- Insight into the capabilities of different service providers
- Assistance with your fiduciary manager selection process, including the right questions to ask
- Advice on the transition from your current arrangements to a fully implemented approach
- Tailored workshops to help your scheme’s trustees understand the advantages and disadvantages of delegating authority, including what implementation issues may arise and how fiduciary managers are best monitored

**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.



### For more information

**John Arthur**, one of AllenbridgeEpic's Senior Advisers, is spearheading our fiduciary oversight service.

John has over 25 years' experience within the defined benefit pension industry, most recently as Director of Client Services at Aerion Fund Management, the in-house Fund Manager for the £14bn National Grid UK Pension Scheme.

John would be delighted to chat further with you.

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# AllenbridgeEpic

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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.