

## pension portfolio consultancy

Pension portfolio consultancy services can be provided by Rowanmoor Investment Management Limited. A Consultant will liaise with clients and their advisers on the construction of their pension investment portfolio. Following a review of objectives, undertaking a risk profile and creating a statement of investment principles in consultation with a Rowanmoor Pensions actuary, advice can be given on suitable investments.

All advice will be made in writing and meetings with the client to discuss the recommendations will be held as appropriate.

- Advice on permitted investments and asset allocation.
- Preparation of the scheme's statement of investment principles, detailing the liabilities of the scheme, asset allocation and the trustees attitude to investment risk.
- A detailed investment report will be produced to match the asset allocation contained within the statement of investment principles. Funds will be selected from Rowanmoor Pensions' approved panel, or other institutional funds where appropriate.
- Portfolio valuations will be provided every six months and clients will also receive a written annual review of fund performance.
- Individual retirement options consultancy can also be offered to scheme members.



TELEPHONE: 08445 440 440 • FAX: 08445 440 500  
enquiries@rowanmoor.co.uk • www.rowanmoor.co.uk

## Rowanmoor Pensions

Rowanmoor Pensions is a trading name of Rowanmoor Group plc (No. 5792242), Rowanmoor Trustees Limited (No. 1846413) and Rowanmoor Investment Management Limited (No. 3445656) are wholly owned subsidiaries of Rowanmoor Group plc. All companies registered in England at Rowanmoor House, 46-50 Castle Street, Salisbury SP1 3TS.  
Rowanmoor Investment Management Limited is authorised and regulated by the Financial Services Authority.

**If you require this document in audio tape, large print, Braille or PC disc format, please telephone 08445 440 550 or fax 08445 440 500.**