



Complete your fund management strategy with the essential governance and compliance advice of AllenbridgeEpic

AllenbridgeEpic

INVESTMENT ADVISERS

AllenbridgeEpic's independent, professional advisory services for governance and compliance are the perfect strategic fit to ensure the credibility and performance of your pension schemes.

The Department for Communities & Local Government (CLG) has issued regulations and statutory guidance relating to the preparation of a Governance Compliance Statement by Local Government Pension Schemes. The guidance provides a detailed description of each of the best practice principles against which compliance is to be measured.

The CLG refers to the participation of an independent professional observer in the governance arrangements to provide impartiality and to enhance the experience, continuity, knowledge and performance of Committees or Panels. CLG suggests that such an appointment could help improve public perception that high standards of governance are a reality and not just an aspiration.

The CLG describes the role as being to undertake independent assessments of compliance against the Myners' principles and other performance benchmarks, and to offer a practical approach to the management of risks.

What Does AllenbridgeEpic's LGPS Governance Service Provide?

Independent advice on governance and compliance provided by AllenbridgeEpic to include the following key outputs:

- Attendance at meetings of employers.
- Attendance at meetings of the Investment Committee or Panel.
- Attendance at meetings with officers.
- Provision of advice on matters relating to governance in connection with LGPS, both to those meetings and to officers as required.
- Undertaking an assessment of the Governance Compliance Statement and a compliance overview of the other published statutory statements relating to the administration of the pension fund.
- Submission of an annual report on compliance to the Investment Committee or Panel.
- Liaison with other advisers and service providers as required.
- A practical demonstration of good practice in operation.

For more information please contact Karen Shackleton or Peter Scales on +44 20 7409 1111
AllenbridgeEpic Investment Advisers, 17 Hill Street, London, W1J 5NZ www.allenbridgeepic.com

AllenbridgeEpic Investment Advisers Ltd is an appointed representative of Capital Advisory Partners Ltd which is authorised and regulated by the Financial Services Authority.

Reap the benefits of AllenbridgeEpic's governance & compliance advice

- Access to the experience of both the individual adviser and other senior AllenbridgeEpic advisers
- Continuity of advice through any changes in the Investment Committee structure and other representatives
- A deep knowledge and understanding of the administration of the LGPS and other pension fund related matters
- Impartiality of an independent company focused on pension fund advice and training
- Practical experience of performance monitoring and reporting
- A strong alliance of investment and governance advice
- Being a lead mover in this area of developing best practice

Experience our unique, independent and specialist knowledge

The provision of the service is led by Peter Scales OBE, former Chief Executive of the London Pensions Fund Authority (LPFA) and a Senior Adviser at AllenbridgeEpic Investment Advisers.

As the Chief Executive of LPFA, Peter was responsible for the administration of an LGPS fund valued at £3.5 billion and with 73,000 members. He led the restructuring of the Pension Fund investments, linking strategy to liabilities and he also played a lead role in introducing fund strategy statements.

During his career, Peter has made a major contribution to developing good pension strategy.

He chaired the CIPFA Pensions Panel and sat on a number of Government working parties. In that capacity he made a significant input to the regulations and guidance currently applying to local government pension schemes.

Since leaving LPFA, Peter has built up a number of governance roles, chairing the Marathon Club and the Enhanced Analytics Initiative. He is also a trustee of the Life Academy and the Scout Association Pension Fund.

Until recently he was policy adviser on the LGPS to the Local Government Association and maintains contact with the CLG. Peter has been appointed as Governance and Compliance Adviser to the North Yorkshire and Dorset pension funds and has provided governance advice to other LGPS funds.

In addition, members of AllenbridgeEpic are currently appointed as independent investment advisers to five Local Government Pension Scheme clients, helping emphasise AllenbridgeEpic's commitment to LGPS clients and the specialist LGPS expertise that is provided by the member of AllenbridgeEpic.

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AFFORDABLE CONSULTANCY

At AllenbridgeEpic we charge set fees. Everything is clearly costed before you commit to our consultancy. 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 and advisers who have worked both in the investment fund and pension fund arenas.

All have distinguished, enviable track records. You'd be hard pushed to find such expert advice anywhere else.

INDEPENDENT THINKING

At AllenbridgeEpic we have access to the independent research source within Allenbridge Ltd.

This allows our advisers to offer uncompromised advice based on their own independent thinking and backed up by research that banks and institutions pay a premium for.

ACTIONABLE OUTCOMES

At AllenbridgeEpic we won't leave you feeling 'what exactly, did I pay my consultants 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.

Independent, uncompromised, trusted investment advice for pension trustees

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