

CASE STUDY:

FIDUCIARY MANAGEMENT



chartered ● ● ● ●
developments



Written by:

Rohan Hardeman

Chartered Developments

Rohan Hardeman



8 Kew Court, Pynes Hill,
Rydon Lane,
Exeter EX2 5AZ

Chartered Developments is recognised as a market leader in the financial industry.



01392 247200

The highly successful team, headed up by Rohan Hardeman, can call on years of experience of industry calling.



rohan@chartdev.co.uk

For more information on how Chartered Developments could help you please call to speak to Rohan on 01392 247200

CLIENT PROFILE

A leading global provider of Fiduciary Management investment solutions. These solutions are designed to help their clients meet financial objectives, reduce business risk, and fulfil their due diligence requirements.

THE BRIEF

- To gain introductory meetings with senior level executives (typically Finance Director, CFO, Chair of Investment Committee or Chairman to Trustees) to discuss the possible opportunities offered by the fiduciary or 'manager of managers' approach.
- Pension Managers and internal Investment Managers are avoided as the outsourced investment proposition can be seen as a threat to their role.
- To qualify – scheme details, asset size, liabilities, open/closed, valuation date etc.

TARGET DATA

UK based companies, with a DB pension from £15m - £unlimited.

THE CAMPAIGN

This is an ongoing campaign designed to secure fully qualified appointments for the client and to increase awareness of Fiduciary Management in the Defined Benefit and Pension Fund Investment market place.

THE RESULTS

Chartered Developments have exceeded their target of 110 appointments year on year for 7 years.

Appointments are made with new target firms and the brand awareness of the specialist capabilities of our client continue to be established within the defined benefit sector. The client continues to be in contact with those firms and they have also secured some significant business wins.

The project with Chartered Developments is on-going.

WHY CHARTERED DEVELOPMENTS?

Chartered Developments have been able to assist our client in meeting with potential clients who are considering their pension fund options in today's volatile economy.

Although the technical details of Fiduciary Management are complex, Chartered Developments are able to converse at a senior level to secure appointments, build relationships and raise brand awareness with key targets on behalf of our client.

chartered ●●●●
developments