

# PENSION LAW CASE STUDY



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**developments**



Written by:

# Peter Rosenwald

Marketing Director - Chartered Developments

*Peter Rosenwald*

Peter Rosenwald is one of the UK's leading experts of Lead Generation for Pension Law. If you would like to learn more about how we can help you generate new business then please don't hesitate to get in touch.



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## Business Sector: PENSIONS LAW

Chartered Developments work with several, well known, national & regional Pension Law firms.

Other related clients include; Actuaries, Investment and Fiduciary Managers, Administrators, Pensions Auditors and specialist software providers.

In terms of our work to date it is not possible to detail individual case studies due to the strict NDAs we have in place with our clients.

The below is therefore a broad overview of our recent Pensions Law experience.



### The more common brief

To create a constantly updated database of prospective clients.

To gain introductory meetings with senior level executives of the corporate sponsor and or trust (typically Finance Director, CFO, Chair of Trustees, Pension Director).



### The data

Chartered Developments create and supply a database of DB schemes matching each client's required criteria regarding their target market; DB schemes, Corporate Sponsors, Universities, Charities, other endowments.



### The campaign

The campaigns have been wide and varied, including multiple messaging such as:

- DC - Auto-enrolment
- SIPP (& SSAS) providers – SIPP compliance to avoid mis-selling, Mergers & Acquisition (buyers and sellers)
- DB - general introductions to scheme trustees and corporate sponsors. From smaller schemes through to £1 billion + DB schemes depending upon each client's target market.
- DB Investments & De-risking
- Independent Trustee services



### Database of prospects

In the long run the database will include invaluable information such as; Scheme size, valuation dates, decision maker details, incumbent lawyers / actuaries / accountants, significant dates (valuation dates etc) and more.



### Leads

Cost per lead has averaged at approximately £600 per fully qualified appointment attended by our clients and has taken on average 8 hours calling per appointment to make. The outcomes have ranged from 6 hours per appointment through to 11 hours per appointment depending upon the client which equates to between £450 and £825 per fully qualified appointment.

Targeting £1 billion + AUM DB Schemes on behalf of a large, top tier, London City based Pensions Law firm, 23 fully qualified meetings have been created in less than 12 months and business has already been written. Chartered Developments exceeded the client's targets by 200%. With twice as many meetings created as were anticipated, our client is delighted.

If you would like to know more about how Chartered Developments could help your business then please contact Peter Rosenwald today.



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