

# Trustee secretarial services

**We provide professional secretarial services to medium and large pension schemes.**

Many of the schemes we help are provided by listed UK companies and include multi-scheme appointments, where we co-ordinate activities across a number of different arrangements.

Our role is tailored to each scheme, but typically includes:

- **maintaining the annual business plan**, arranging meetings, packs & minutes
- **overseeing scheme governance** to ensure it remains effective
- **liaising with advisers** and briefing them well so trustee meetings run efficiently
- **organising adviser reviews**
- **pension project management** - for example, data cleansing exercises, scheme changes, buy-ins, buy-outs, GMP equalisation and single code

## What we bring

Our scheme secretaries and dedicated support team are **senior pension industry professionals**. They come from a range of relevant disciplines, including pensions management, administration and project management.

In addition to this **well-rounded experience**, we bring:

- **Dedicated, independent secretarial services**. This is our day job, we don't have other roles causing distractions or conflicting priorities.
- **Fresh ideas** and new perspectives to discussions and issues.
- **Ability to manage multi adviser relationships** driving high service standards and value for money.
- **Certainty** we will get the job done.

# How we work with clients

We provide a personal, proactive and committed service.

A scheme secretary is a personal appointment. You need to find the best for you. Getting the **right personality and experience** is important.

**We become part of your home team**

We don't feel like another adviser.

**You receive tailored support from day one**

We build trust and confidence.

**We help empower & educate**

Trustees by recognising individual needs.

**You benefit**

From transparent fixed fees delivering value for money.

We deliver a consistent, high quality service, built around key attributes important to our clients.

**accuracy | availability | proactivity | timeliness**

We deliver these through our people, our processes and our effective use of technology.

- Our **formal measurable service** standards ensure certainty and efficiency.
- Our **formal procedures** cover all key aspects of our business and service delivery. They are independently audited and **meet AAF 02/07 standards**.
- We use **technology** to deliver our services in a **timely, transparent** and **efficient** way.

## Get in touch today!

Please contact:  
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