

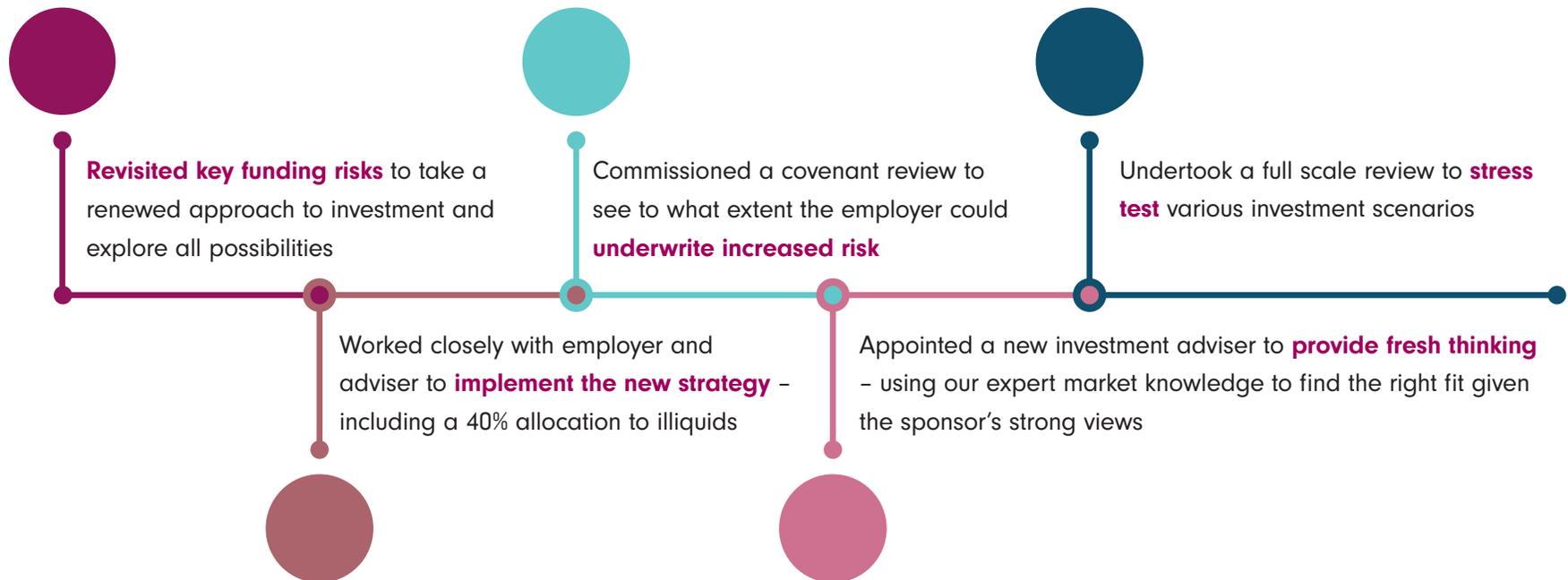
Case study

Working collaboratively with a scheme sponsor to develop a long term strategy

Background

We were appointed as sole trustee for a scheme where relationships between the trustees and employer had broken down. The employer is a sophisticated investor that understands complex investments and was keen to use more illiquid assets to help boost long term returns with lower volatility. They felt the former board approach **unwieldy, overly combative and slow** to embrace new ideas.

What we did





The result

The combination of investment adviser expertise and our trustee knowledge enabled us to set an investment strategy to help **reduce future funding volatility**, get **quick agreement** then **swiftly implement** direct lending and infrastructure mandates.

The employer's relationship with the scheme has been **revitalised** with increased engagement. The collaborative, **open dialogue** approach we took was vital to ensure full understanding and **sharing of risks**, especially given assets would be tied up for a long period.

