

Break out session:

How can Trustees improve their investment efficiency using a platform?

LCP – How using an investment platform for DB assets can reduce your governance time and investment manager costs.



Objective:

Platforms have previously been the engine of choice for many DC plans, providing efficiency through a single contract and access to asset classes and funds that may have previously been inaccessible to trustees. This concept equally translates to DB plans, particularly for small to medium sized schemes. A platform solution might also be an alternative to jumping to a fiduciary approach to managing investments. Zuhair will share his insights and the key issues that trustees may wish to consider when looking for operational efficiency and capturing investment opportunities in the most cost effective way.

We look forward to seeing you

Zuhair Mohamed



What can you expect from the session?

Zuhair will chair an interactive session where you can share your thoughts and hear from your fellow trustees. In particular we will focus on how trustees are dealing with investment manager costs, understanding value for money and look at alternative methods for operational efficiency of scheme assets, particularly for maturing schemes that are managing cashflow and disinvestment.



Outcome:

To help you feel more confident in your role when dealing with investments; feel empowered to question complexity, confident enough to be able to challenge advice being given and raise concerns or new ideas with your fellow trustees.



My name is Zuhair and I recently joined LCP having worked in consulting and fiduciary fund management for almost three decades. I have helped DB, DC, insurance and charity clients on all investment matters and I have had the pleasure to work with corporates, trustees and in-house teams for some of the best run asset pools in the UK.

I have a passion for de-mystifying the complex and helping trustees find the most cost efficient solutions to meeting objectives.

Zuhair has three decades of investment experience in advising UK and overseas pension plans. He has been the lead adviser to various plans ranging in size from £5m to over £1bn in assets. Zuhair specialises in creating efficient and pragmatic investment strategies.



Insights and opinions
on our blog at
www.lcp.uk.com



Updates from our
experts on LinkedIn



News and conversation
on Twitter:
[@LCP_actuaries](https://twitter.com/LCP_actuaries)



Comments on topical
issues on YouTube
[www.youtube.com/
LCPPensions](https://www.youtube.com/LCPPensions)