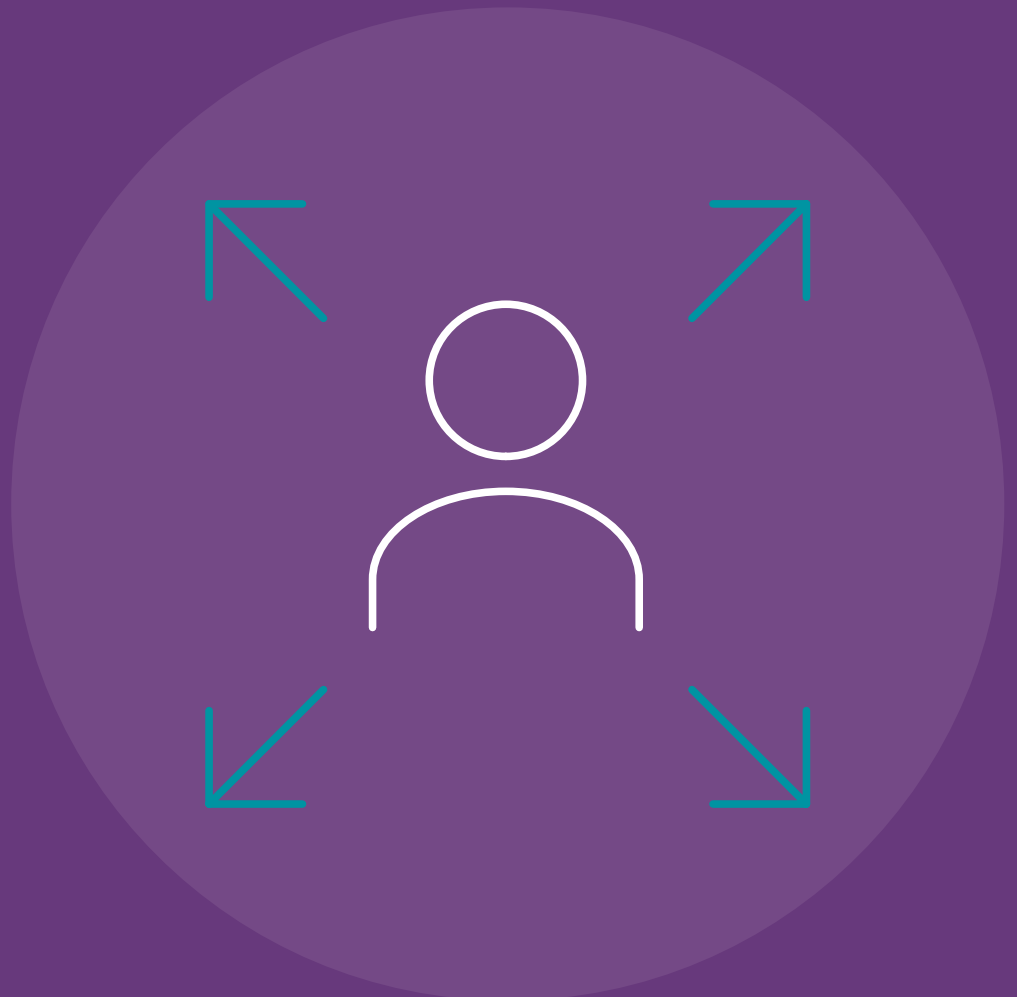


# PENSIONS MANAGER SERVICES

Flexible support to help companies manage  
their pension arrangements.



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## GOOD, BETTER, BEST.

The Pensions Manager plays a critical role in the leadership of the scheme. They act as the main interface between the Company and the Trustee, ensuring that pension schemes operate efficiently and that excellent scheme governance is achieved in line with the pensions strategy.

A truly effective Pensions Manager needs to be able to stay strategic and drive through projects and initiatives whilst rolling up their sleeves and immersing themselves in all aspects of the pensions mix.

The best Pensions Managers balance all of these duties whilst acting as an experienced intermediary and a skilled mediator. Not always straightforward.

This is where Ross Trustees can help. We offer an outsourced pensions manager with first-class industry experience and first-hand knowledge of what works well elsewhere. Whether it is a short-term project or long-term appointment, we have the right individual or the right team.

## FLEXIBLE SERVICES

Outsourcing your Pensions Manager can alleviate pressures on your HR and Finance teams and headcount. Our Pensions Manager support is agile and flexes around your specific requirements.

Our independent, expert team can work on an ongoing or on an interim basis. We can base ourselves at your company's office or work remotely. We are able to provide strategic, high-level input or feet on the ground support to resource projects.

It can be a Company Pensions Manager appointed by the Company, or a Trustee Pensions Manager appointed by the Trustees.

Working with all parties, the range of services includes:

- Developing and executing a strategy based on practical experience of working with other schemes
- Dealing with all day-to-day, business as usual pensions related matters
- Project or initiative support – strategic direction or executing against a plan
- Attendance at Trustee, sub-committee and company pensions meetings
- Reporting to HR and Finance across a number of metrics
- Member communications and liaison.

**“We are able to provide strategic, high-level input or feet on the ground support.”**

## WHY ROSS TRUSTEES?

### BEST PRACTICE

Our multi-levelled team ensures the right person for the right job at the right cost; we can operate using an agreed hourly rate or a fixed budget to cover the scope of services that you require.

### EXPERIENCE

The Pensions Manager is a key role which we ensure is executed by high quality specialists. Our team has over 70 years' combined experience as Pensions Managers gained from a variety of backgrounds, including in-house and seconded experience.

### INDEPENDENCE

With no affiliations to other pensions advisers and consultancies, we work effectively with other firms and advisers from across the pensions world. We provide an objective view and hold advisers accountable.

### KNOWLEDGE

Our experience spans all types of pension arrangements – defined benefit and defined contribution schemes, GPPPs and Authorised DC Master Trusts. We fully understand pensions issues, including life insurance, income protection and auto-enrolment.

### VALUE

We control your spend through close management of budgets and use a robust framework to review and track costs. We challenge based upon experience with similar schemes and add value with an independent viewpoint.

## OUR CREDENTIALS

- Designed and implemented a new strategic vision for the pension scheme for the Company and the Trustee, partnering with the Chief Financial Officer and Chair of the Trustee Board
- Guided Trustee Boards through complex discussion with the Pensions Regulator
- Transformed governance structures resulting in improved strategic and operational decisions
- Influenced valuation negotiations to ensure a satisfactory outcome was reached for both the Company and the Trustees, despite starting from very different positions
- Raised standards on pensions administration, resulting in improved member outcomes.

**“We offer an outsourced pensions manager with first-class industry experience and first-hand knowledge of what works well elsewhere.”**

## CONTACT US

For more details of how the team at Ross Trustees can help you and your business, please contact:



**MANPREET SOHAL**

Trustee Director

M +44 (0)7760 882 793

E [msohal@rosstrustees.com](mailto:msohal@rosstrustees.com)

### ABOUT ROSS TRUSTEES

Ross Trustees specialises in providing independent professional trustee and support services to occupational pension schemes.

Established in 2010, and widely viewed as a leader in its field, professional pension trusteeship is at the heart of what the business offers and is delivered through a combination of Chair of Trustees, co-trustee and sole corporate trustee appointments. Over a third of the firm's appointments are to act as sole corporate trustee. The professional trusteeship side of the business is strengthened by a standalone support services arm, which provides secretarial, pensions managerial and governance solutions to a variety of clients.

The 50+ team includes pensions expertise drawn from many different disciplines, such as investment specialists, lawyers, actuaries, pensions managers and consultants. The team is known for providing diversity of thought and wide-ranging collective experience.

The team works with over 100 schemes who manage a combined asset value of approximately £30bn. Schemes range in size from the low millions to multi-billions and operate in a variety of industries and sectors.

Ross Trustees is a prominent member of the Association of Professional Pension Trustees (APPT). Members of the firm play an active part in APPT committees and all Trustee Directors are fully-accredited as professional trustees.

**ROSS**  
Trustees