

FIDUCIARY INVESTMENT CONSULTING SERVICES



THE ALTAIR ADVANTAGE

Altair offers independent skills and experience to assist Fiduciary Service Providers (FSPs) in managing their fiduciary duties in the oversight of assets under their administration.

Whilst the investment management and independent performance risk reporting on such assets may be delegated, the duty to govern and monitor are an absolute duty.

THE ALTAIR APPROACH

> Enhance processes

Altair can support FSPs to evolve and enhance their existing processes, as well as their ability to reduce costs and generate new revenue from both improved client services, and the pooling of assets under administration, for the benefit of their clients.

> Experienced professionals

Altair will provide an experienced professional to work alongside you to undertake process or procedural reviews, and then support implementation. Our expertise has been built up from hands-on management of financial assets and acting as a fiduciary 'gatekeeper' over the last 30 years.

> Overcome operational challenges

We aim to ease some of your operational challenges to give you and your staff more time to spend with your clients. We will give you better control of costs and permanent staff numbers through the provision of experienced professionals to ensure you deliver on time.

> A tailored approach

Our services are priced on a time cost basis and will be tailored to your specific needs and business. We also offer fixed ongoing retention tariffs, and where sufficient scope is available, bespoke service levels and fees may be agreed.

> Independence

Independent analysis is crucial in providing an objective view presented with considered feedback and guidance of best practice. We are subject matter experts in our field and you will reap the benefit of our analytical skills and independence of thinking.

HOW WE CAN HELP

> Fiduciary Investment Duty

Investment oversight is an absolute duty of a trustee, and regulatory-themed visits often cite weaknesses in this area. A fresh review of this process by an independent professional will help to identify risks and solutions, including possible efficiencies and new revenue opportunities. We can also join, and if required chair, the investment oversight committees/forum, to further strengthen this aspect of a fiduciary business.

> Investment Suitability

As a fiduciary knows, investing is never about one individual, but multiple beneficiaries and factors. Are Behavioural Finance, ESG Responsible Investing and Sustainable Development Goals a fad, or worthy of consideration when setting out a fiduciary's investment strategy? Can you sufficiently evidence that you own the investment suitability process? Altair provides the skills and experience to define and leverage suitability through a fiduciary lens, for the benefit of your business and your clients.

> Manager Selection

FSPs can deal with a multitude of investment managers, resulting in increased costs which they may struggle to recover. Altair will enable you to have a clear process around future manager selection that will focus on time-spent recovery for value added work and, in turn, leverage referral opportunities from Asset/Wealth Managers.

> Education and training

Whilst FSPs are not expected to be subject matter experts, they need to know the appropriate questions to ask of their appointed investment professionals. Altair will run workshops to help you maintain best practice on new processes or technical areas to ensure your governance model is well defined and robust. Investing in improving your staff's knowledge will not only enhance client experience, but will also support your ability to recruit, grow and retain.

> Other Services

- Family Office consultancy and investment oversight services
- Independent Investment Director services
- Investment Due Diligence
- Expert witness reporting
- Counterparty risk management and liquidity

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