



Our approach to implementation to On appointment, we will specify and manage the transition of services and administration data from the incumbent providers. Our transition and implementation project typically delivers:

- A consultative review outlining any concerns or areas for action in relation to the management of the scheme.
- An administration database populated with member data received from the incumbent.
- An administrative review of the headline quality of the data, with full gap analysis and suggested actions to rectify any issues.

Our approach to fees

We believe in charging realistic fees for realistic services. Fees are determined by the membership of the scheme and the range and extent of our agreed services. Integrating services can lead to cost-efficiencies, as duplication of work is removed.

We will agree the range of services that our clients require, and the fees that we will charge, at outset.

We can work on a fixed fee, time cost fee or capped fee basis, to suit our clients.

Additional projects will be agreed in advance with fees levied either on a fixed or time cost basis. Where time cost fees are agreed, we will provide a budget at outset and can work to a cap if required.

About us

*...practitioner led,
friendly &
approachable...*

*...putting clients
first...*

*...long-term
partnership
approach...*

*...by your side, for
every step...*

*...proactive,
relevant & fast...*

*...adding true
value...*

...jargon-free...

- We are a small, specialist actuarial, advisory and administration practice. Working in the mid-market space, we focus on the design and provision of pension and employee benefit solutions.
- Our clients range in size by membership from below 50 to over 6,000, and have pension assets well in excess of £3bn.
- Our philosophy and objectives are simple – to be a trusted partner to our clients and to provide the highest quality of services to assist them in the smooth and efficient management of their pension and benefit arrangements.
- We are proud to be a small firm. Privately owned, and with all employees participating in our profits, our size allows us to operate a proactive, truly integrated, multi-disciplined client-team model, which has the skills, the experience, the resources and the drive to meet our clients' diverse and changing demands.
- We place a high value on people and relationships – we understand that corporate relationships are often driven by the people behind them. We invest in our employees and in our client relationships. We put our clients first. We know our clients. We listen to our clients. We understand our clients. This helps us to shape our services, enhance delivery and exceed expectations.
- We provide an exciting, stimulating and challenging working environment – our employees respond to this and are passionate, focused and driven. This focus and drive helps us to deliver exceptional quality corporate and trustee advice and guidance to 150 clients.
- Because of our market focus and without the distraction of non-core activities, we understand our clients' issues. We anticipate and identify concerns and needs before they become problems, shaping advice and solutions around these to deliver their objectives, both now and in the future.
- We are pragmatic and we add value – by understanding the key issues, we deliver practical, relevant and tailored advice, and we do it quickly and in an understandable and digestible form.
- We are approachable and use plain English – we talk to our clients and their scheme members in a friendly and understandable way, without the use of jargon.

For more information and to learn more about how our solutions can help you, please contact:

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