

Investors suffer  
from information  
overload

Trustees need a  
demonstrable strategy if  
challenged legally

Key Policy  
documents  
support this  
strategy

Face to face or  
distance learning  
aids good  
decisions

## Investment consulting trustee protection, support and education *from* Malaczynski Burn

Most institutional investors face the difficult task of creating strategy for and monitoring activities on their investments in a world full of irrelevant and distracting information.

The key is to develop a defensible strategy that protects trustees' liability while benefiting members through the provision of better returns, good governance and strong risk management

### Protecting trustees from litigation

In the face of any litigation, trustees need to be able to demonstrate due process showing due care, diligence and best efforts on their members' behalf. Malaczynski Burn will provide sound business plans with the necessary research to support all investment decisions by trustees. A full range of policy documents will be produced giving maximum protection to trustees while providing a strong foundation for return generation and risk management:

INVESTMENT HEALTH CHECK – An audit of investment policy against international best practice  
INVESTMENT POLICY STATEMENT – Business plan on all aspects of investment policy  
TRAINING MODULES – Full training on all aspects of investments  
ASSET MANAGER REGISTER – Key details on all contracting and reserve asset managers  
ASSET MANAGER CONTRACTS – Contracts of all contracting managers

### Convenient information management

All policy documents, research papers and a library of useful articles, interviews etc will be stored on a confidential client investment portal on our website. This makes for easier reporting to regulators, communication within the Fund, communication to members and better understanding of a wide range of investment ideas and proposals.

### Audio visual recordings

All contracting managers are video-taped to allow trustees analysis of the sales proposition and then periodic reporting of their work. Additional matters such as asset class analysis, economic issues and other investment ideas are also often held on video to allow greater flexibility for trustees to accumulate knowledge quickly and simply with the minimum of time and effort.

### Education and empowerment

Malaczynski Burn conducts trustee training on investment issues via face to face meetings and distance learning via audio visual services, through our investment portal. Our aim is to tailor all our services to clients' specific needs and time availability. We will train on-site at your offices or at any of our offices or third party premises if appropriate and offer shorter focused training periods of 1 hour right up to full day courses.

The way in which Malaczynski Burn educates trustees leads to high levels of empowerment to allow trustees to take more responsibility and control over their fund. Our aim is to enable non-investment business people to make well informed business decisions rather than abrogating responsibility to third parties.

Our team would be happy to present on a wide range of investment issues and to provide comment on your portfolio positioning if required

**Please contact Beverley Webster on 0114 299 7402 or by email on  
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