HYMANS ROBERTSON

Strategy presentation for specific client

Unlocking value for everyone

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Many options available

Funding

Basic text can be applied here for layout purposes of style

Merged options

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Extra funds

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Insurance

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Journey plans

Basic text can be applied here for layout purposes of style. Basic text can be applied here

Final stage

Basic text can be applied here for layout purposes of style

Things to consider

- Cost
- Size
- Regulations
- Surplus
- Compliance
- Experience
- Maintenance.

There are always many options to choose

Various viewpoints from different teams



Question about the fund in general?

Investigate different means of moving forward

Initial questions?

Sponsor members to help with their fund allocation



Sponsor members to help with their fund allocation

Additional questions that need addressed

Options to cancel at any time without fees

Regulations state route for exit

Question about the fund in general?

Additional concerns about growth



Regulations state route for exit

Additional questions that need addressed

Question about the fund in general?

All points are valid and should be investigated

Choosing a safe route for all savers

The stages of sponsor for each member to reach their destination.

All the steps are taken with the help of an advisor to guide the client through the strategy for the outcome required.



Align

Meet with members to agree a strategy that works for all involved



Define

Formulate a defined pathway to a common end goal by working together as a team



Deliver

Final result is delivered and all parties are happy with the outcome to increase engagement

All routes are considered to meet client needs

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Align



Shared goal to exit

ALIGN

Workshop: start conversation

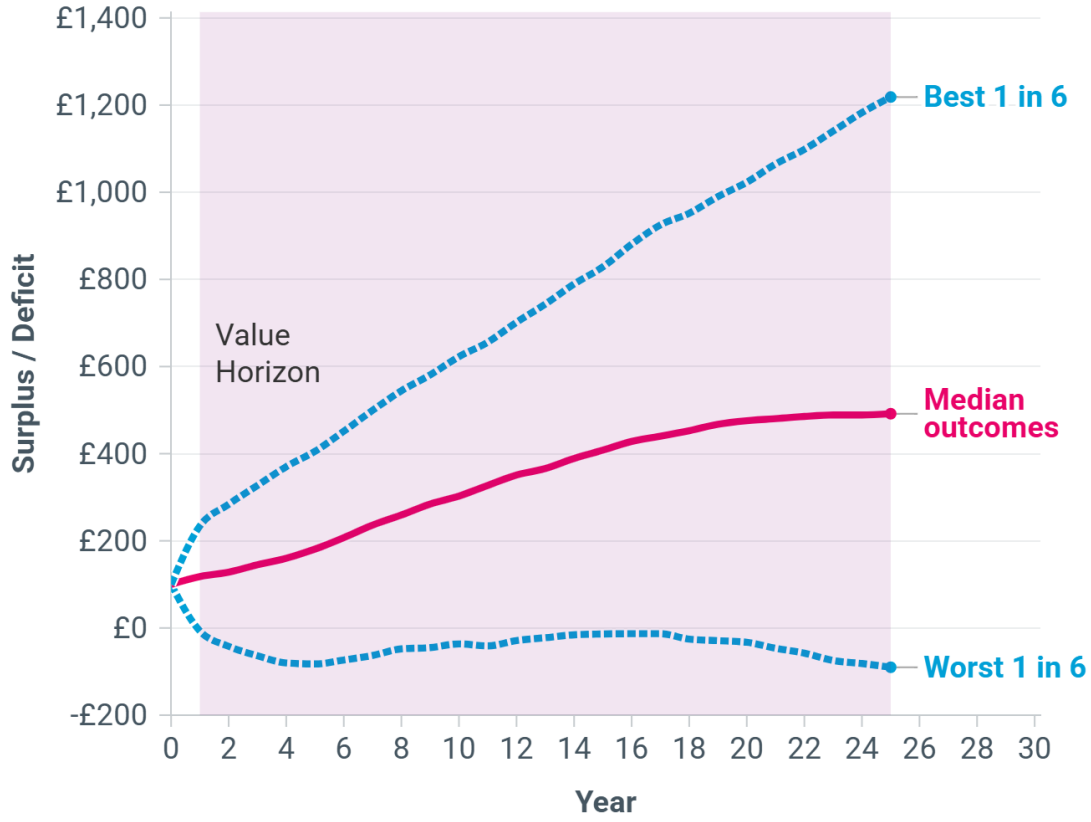
Second stage review: agreements

Final outcome: position resolved

The final outcome is beneficial and what the client expected

Foundations are key in all approaches

Progress charted against success



Example table	
First entry level	£270m
Second entry one	£10m
Second entry two *(Disclaimer)*	Nil

Horizon
20 years

£40m
Additional

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Understanding where your fund lies at any given time is of great value

Compliance and regulatory text here in relation to the graph above and figures included. Compliance and regulatory text here in relation to the graph above and figures included. Compliance and regulatory text here in relation to the graph above and figures included. Compliance and regulatory text here in relation to the graph above and figures included. Compliance and regulatory text here in relation to the graph above and figures included.

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Strategy focus

ALIGN



Regulations

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Information not accurate and included for layout only.

Funding

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Information not accurate and included for layout only.

Costs

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Information not accurate and included for layout only.

Outcomes

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Information not accurate and included for layout only.

Strategy goals align with client needs

Strategy obstacles

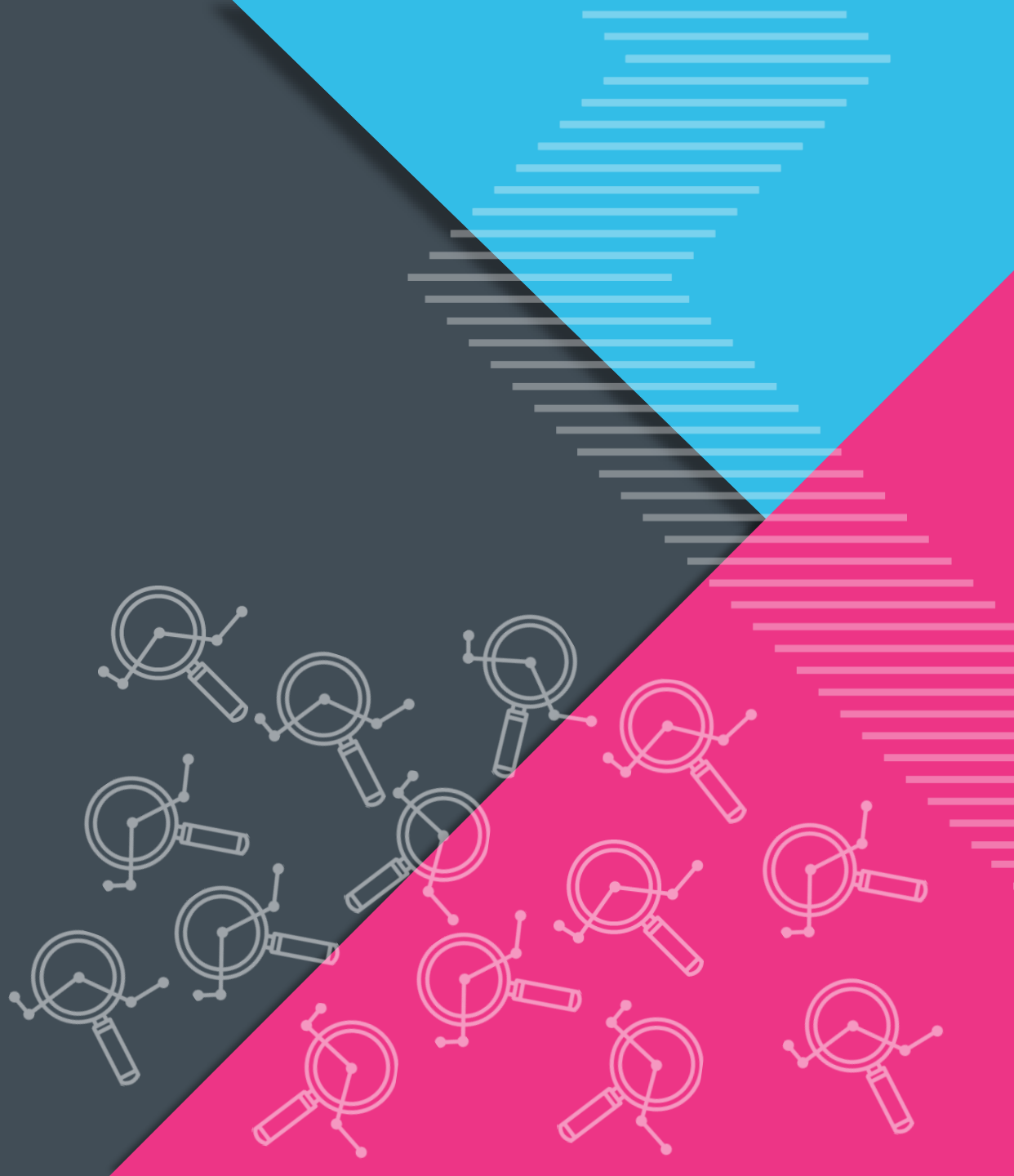
ALIGN

Criteria	Strategies	Surplus information	Extra risk details
Option one		All options over 60% unless stated otherwise	All options over 60% unless stated otherwise
Funding details		Additional charges added Maximum allowances *Options available*	–
Considerations		–	Greater of the two options currently being considered
Highlights		Not greater than initially expected	Not greater than initially expected
Our ideas		55 months	9 days
Our outcomes		£200m	£70m
Final decision		Funds bought	Advice needed

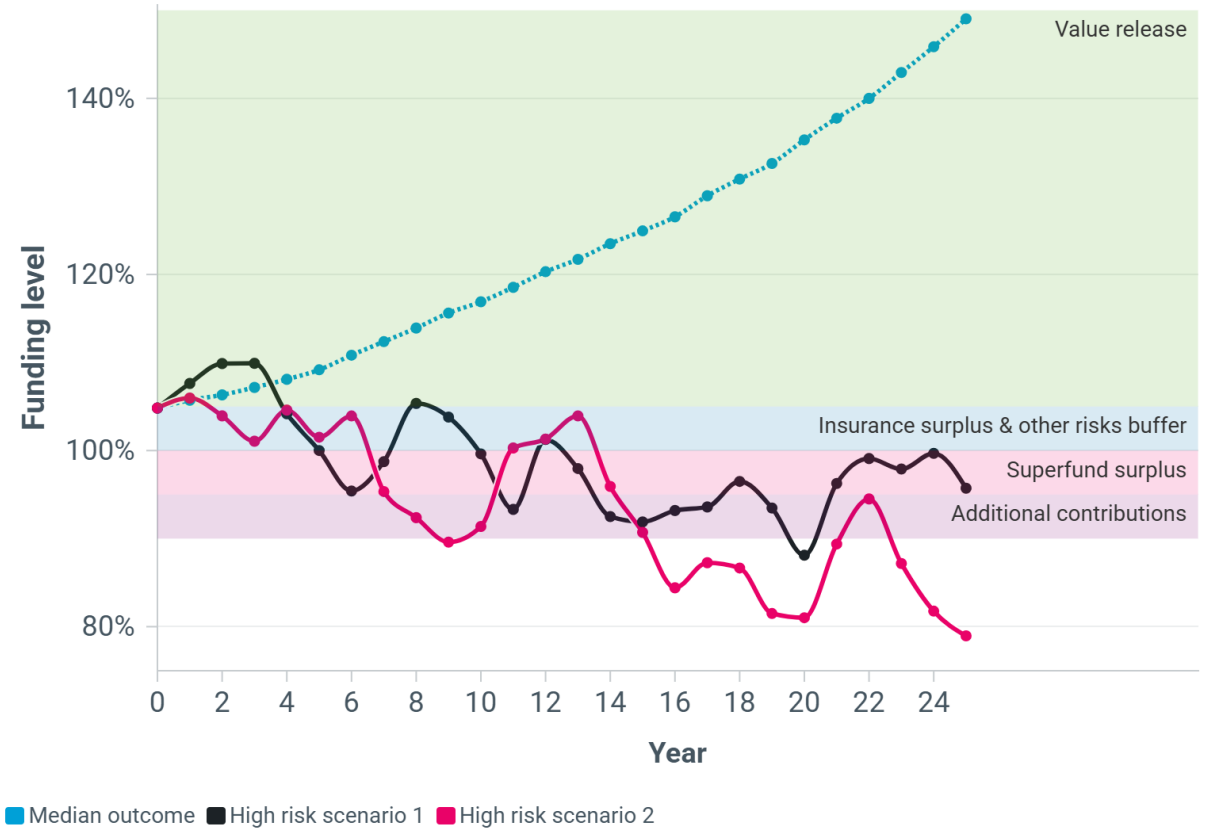
All samples can be tailored to the client and what suits them

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Define



Extra chart information with table



Text table for outlines

All the details here are not exact and only included for layout purposes. All the details here are not exact and only included for layout purposes as an option.

Similar options available

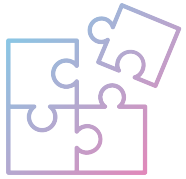
All the details here are not exact and only included for layout purposes. All the details here are not exact and only included for layout purposes as an option.

Sensible considerations are made between all parties

How we can help meet your goals

DEFINE

Building blocks

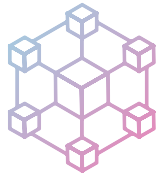


Matching – text here for layout only and not true details

Risk – text here for layout only and not true details

Outcome – text here for layout only and not true details

Strategy

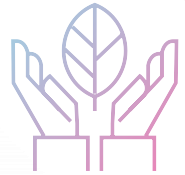


Returns – text here for layout only and not true details

Funding – text here for layout only and not true details

Details – text here for layout only and not true details

Client needs



Risks – text here for layout only and not true details

Rewards – text here for layout only and not true details

Regulations – text here for layout only and not true details

Building information included here to emphasise the details above and give the client additional views to read

Strategy information included here to emphasise the details above and give the client additional views to read

Client information included here to emphasise the details above and give the client additional reading

Strong base level of skills encourages good outcomes

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Deliver



Deliver final outcomes to the client

DELIVER

Strategy process to guide the client through the details



A journey to increase funding levels for all stakeholders

Agreements met

DELIVER



Format

Samples text here just for placeholder purposes so clients can add their own details and comments

Check

Samples text here just for placeholder purposes so clients can add their own details and comments

Discover

Samples text here just for placeholder purposes so clients can add their own

Decide

Samples text here just for placeholder purposes so clients can add their own details and comments

Strategy

Samples text here just for placeholder purposes

Compliance

Samples text here just for placeholder purposes so clients can add their own details and comments

Communicate

Samples text here just for placeholder purposes so clients can add their own details and comments

Focusing all details on client results

Strategy that meets client expectations



Align

Sub heading text here is just for layout purposes as an examples

- Check all routes
- Ensure requirements met
- Align with all samples of funding to recover costs



Define

Sub heading text here is just for layout purposes as an examples

- Check all routes
- Ensure requirements met
- Align with all samples of funding to recover costs



Deliver

Sub heading text here is just for layout purposes as an examples

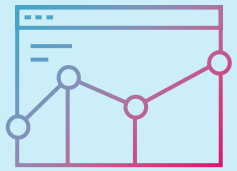
- Check all routes
- Ensure requirements met
- Align with all samples of funding to recover costs

Solid outcome for clients

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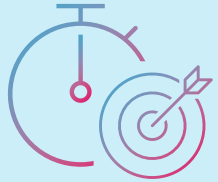
Appendices

Monitor the situation

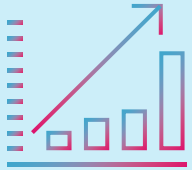


Funding levels

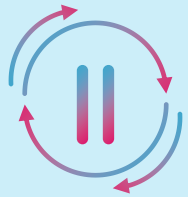
£200m over six years and costs included



Increasing involvement to meet relevant targets



Growth of all assets monitored over time



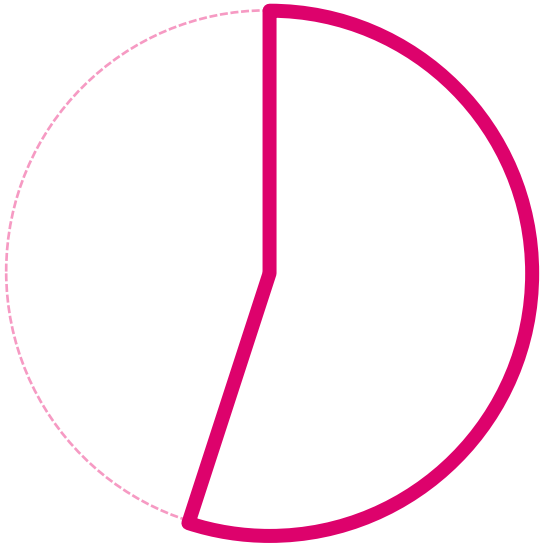
Tactical approach to ensure needs are always met



Link here to a suitable document for further reading on the subject matter with advice included.

Keeping informed of events

Member opinion



55%

of members are committed to growth and value feedback

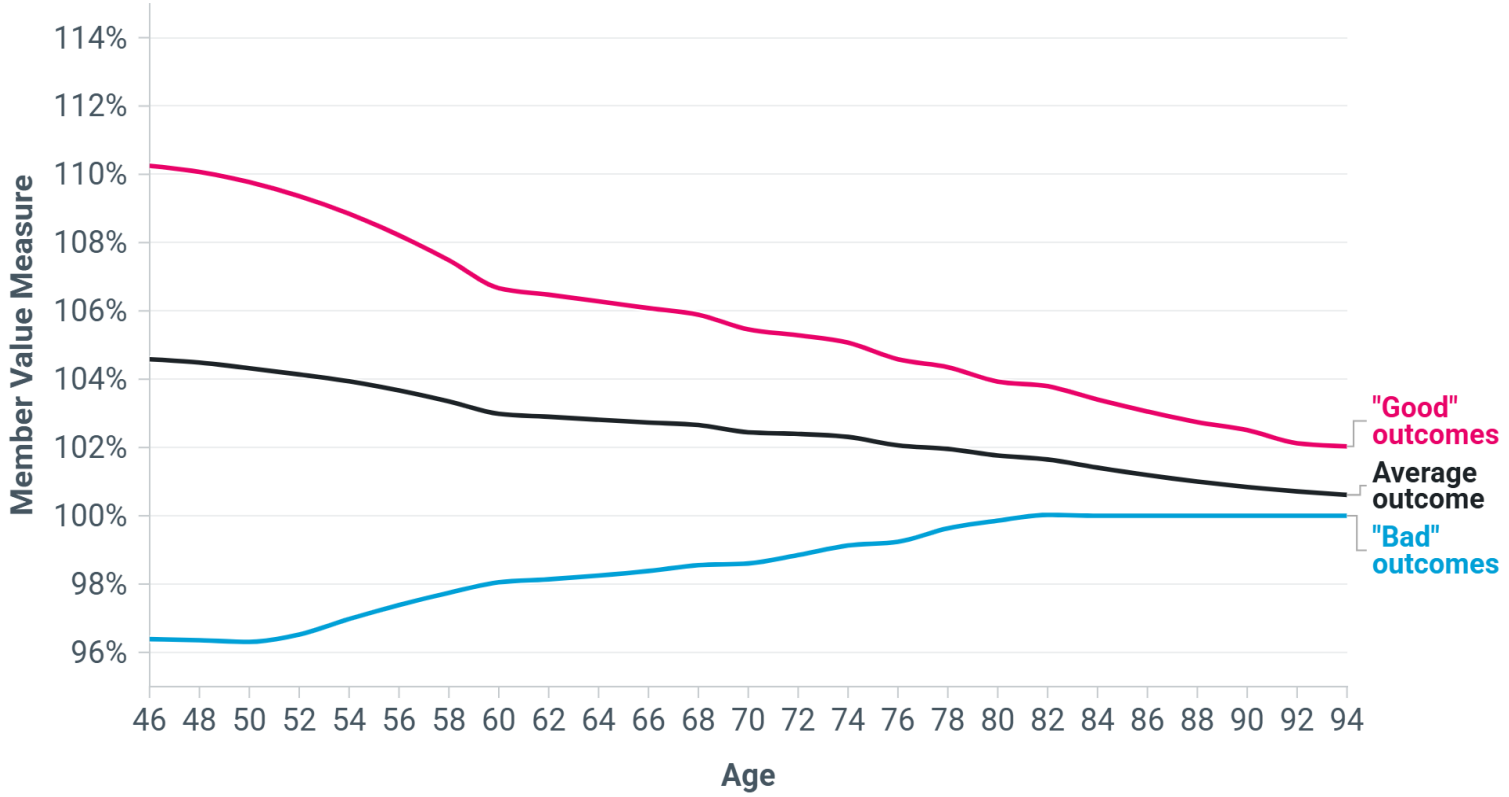
Around 60%

of those asked were happy with output and communication levels overall

Highlight member details for additional support

Regulatory information included here.

Member experience



This is sample placeholder text for layout purposes only and can be changed.

Here member experience, matters to what the final outcome may look like in terms of value and growth levels:

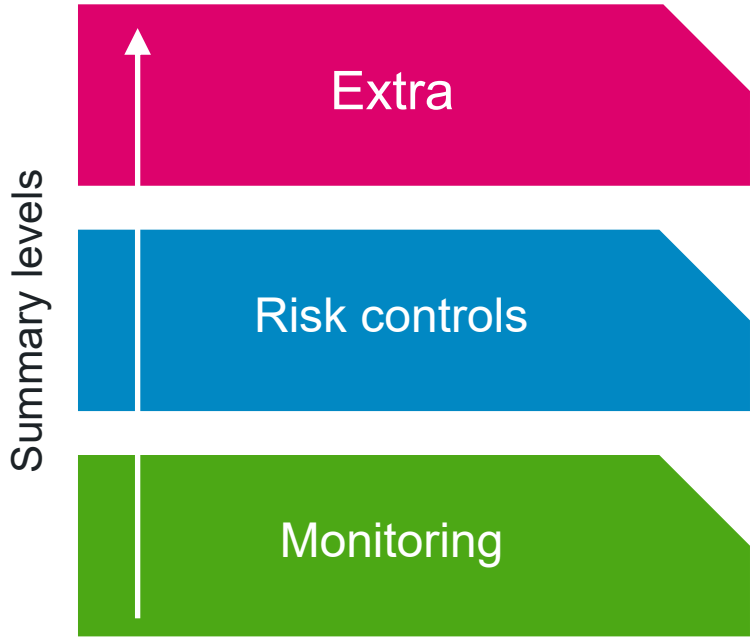
- may increase over time
- can be variable depending on current market conditions.

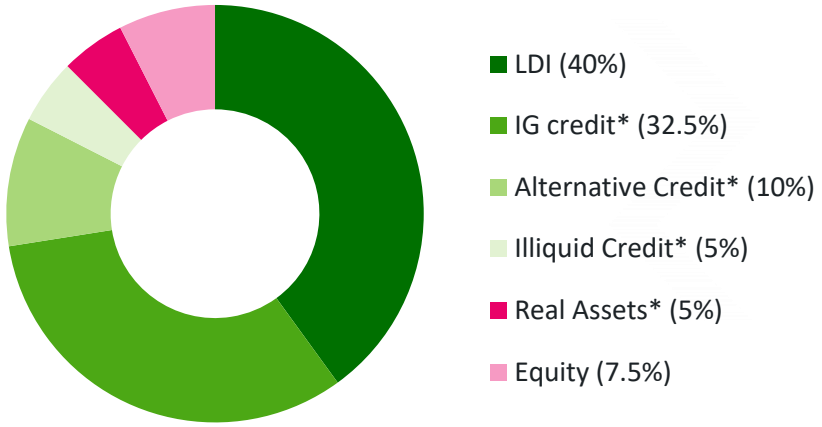
Final comment on member outcomes to help define their levels of risk and return.

Members feel rewards with growth

Investment strategy in numbers

DELIVER





Risk table	
40 year return	3.5%
2 year risk	2.8%

Delivering a great outcome for clients

Compliance text added here as an example but will need updating with the relevant copy.

Example client

Delivering growth for a large client

Introduction text focuses on the initial proposal and how it will be achieved but is just sample text for the purposes of layout and design and may change as required. This text focuses on the initial proposal and how it will be achieved but is just sample text for the purposes of layout and design and may change as required.

- This text focuses on the initial proposal and how it will be achieved but is just sample text for the purposes of layout and design and may change as required.
- Second area here looks at the initial proposal and how it will be achieved but is just sample text for the purposes of layout and design and may change as required.
- Final options for text focuses on the initial proposal and how it will be achieved but is just sample text for the purposes of layout and design and may change as required. Client may need additional information.

This text highlights the outcomes from the client and what they are going to do going forward. It is example text to give an idea for layout purposes and can be changed or updated at any time.

Other text options highlight the outcomes from the client and what they are going to do going forward. It is example text to give an idea for layout purposes and can be changed or updated at any time.

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Where we are in the market

First client

This text describes the company and where they sit within the overall market as a whole. It is just sample text for layout purposes and can be changed or updated as required by the relevant parties over time.

2025 awards

Lorem ipsu

InsuranceERM Awards UK & Europe 2025 Winner
Actuarial consultancy of the year

Additional resources

Click through here to read more about policy details and other informaiton

Policy details

Further information about regulations and compliance matters

This text describes the company and where they sit within the overall market overall. Sample text for layout purposes and can be changed or updated as required by the clients.

Certified B Corporation

B Corp award since **2023**

Heading for extra informaiton

- First point of bullet information goes here as an example for layout purposes.
- Second point of bullet information goes here as an example for layout purposes which can be longer with more text.
- Third point of bullet information goes here as an example for layout purposes.
- Fourth point of bullet information goes here as an example for layout purposes which can be longer with more text. It may need additional lines included.
- Final point of bullet information goes here as an example for layout purposes which can be longer with more text.

Further information can be seen by following this link and reading the relevant article attached.

Risk details

Outline key areas

Higlight total of income

£30 million

Ranging from



£7 billion *to* £9 billion

2024 explanations revealed

£11.6m of advice

About **25%** of all market



the **2 largest** wins in one year

Regulations team:

has done really well over the last year

Resulting in great feedback in general poerformance

won



Award name would be inserted here

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Team members



Name inserted here
Job title and department inserted here



Name inserted here
Job title and department inserted here



Name inserted here
Job title and department inserted here



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Job title and department inserted here



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Job title and department inserted here



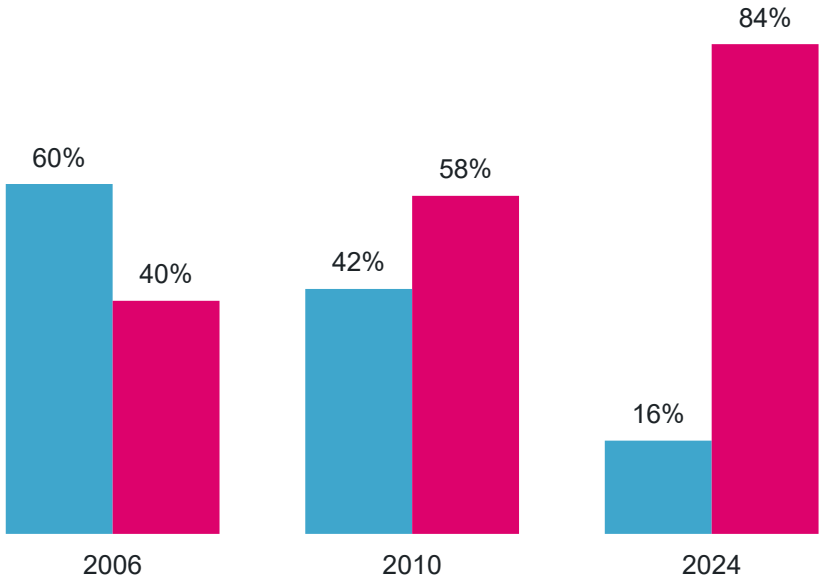
Name inserted here
Job title and department inserted here



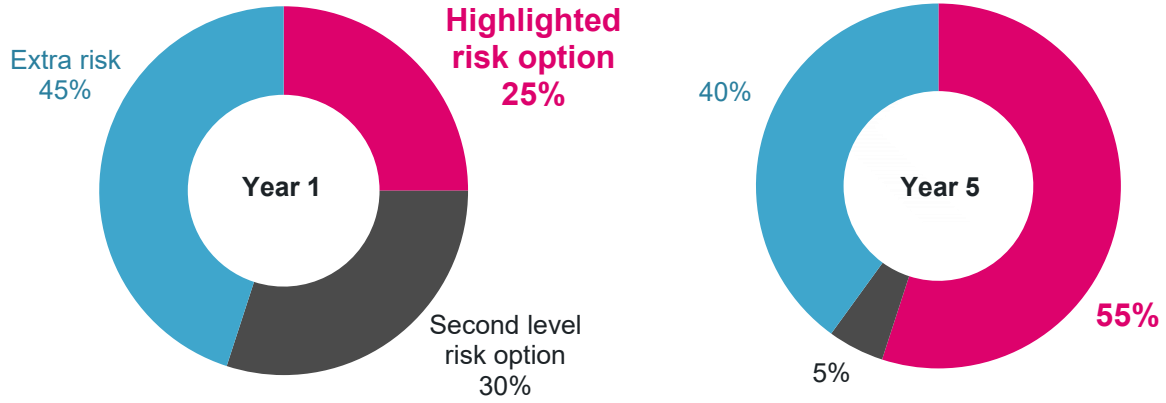
Name inserted here
Job title and department inserted here

Charts for reference purposes

Activity chart



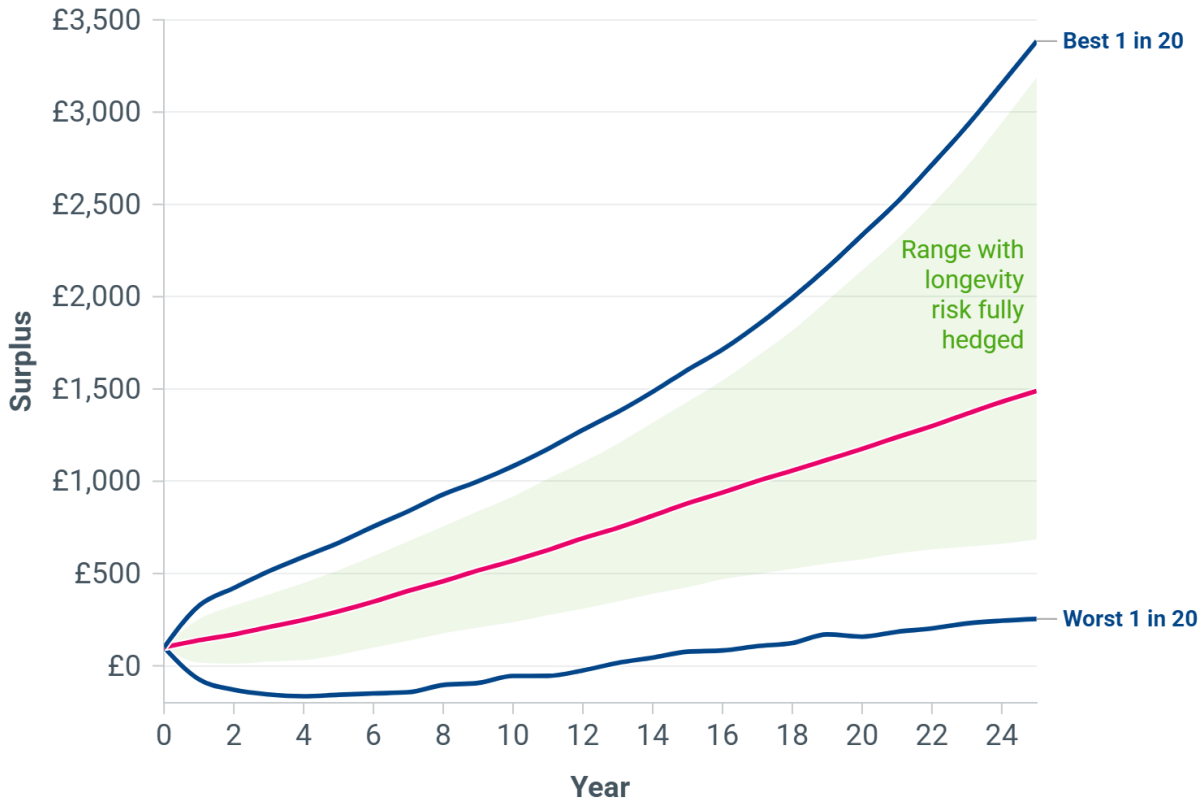
Funding chart



All risks are considered before any outcome are decided

Source
1. First line source gets inserted here.
2. Second and additional source get added here which is likely to be longer in length and linked to other resources.

Further risk chart details



Sample text relating to risk would be included here but this is just for layout purposes and can be changed to whatever is required by the client.

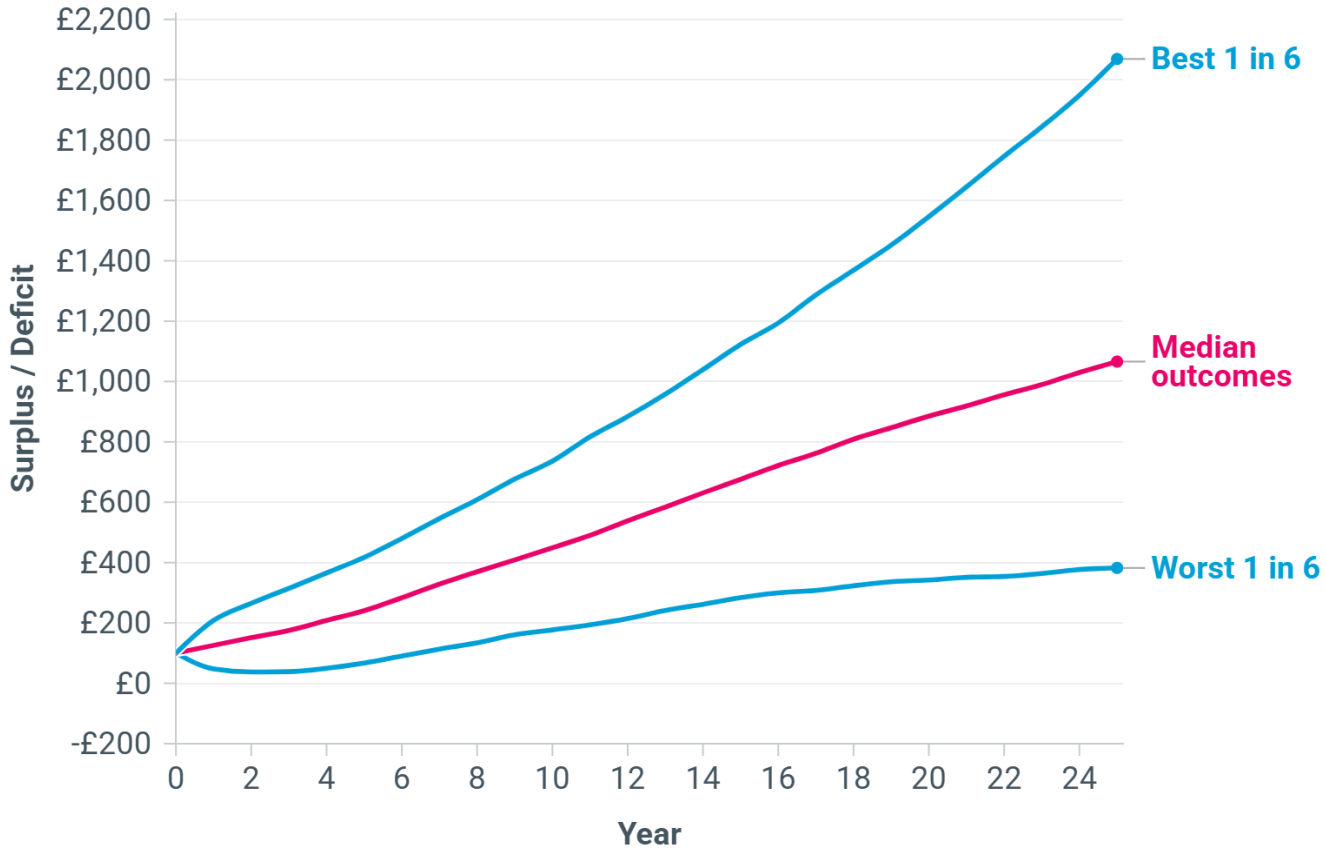
Sample text relating to risk would be included here but this is just for layout purposes and can be changed to whatever is required by the client.

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Understanding risk is key information for a client

Source and regulatory information would be included here.

Outcome for clients



Criteria	
Funding level	Exactly £500m
Minimum levels	
Maximum allowance in each year of allocation	
Maximum final level	

Highlighted 10 years

£44m of allocation

Criteria met

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Thank you

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