



Pension Management **DFM**

with deVere Investment

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Introduction

At deVere Investment, we understand the importance of managing pension investments effectively and in line with regulatory guidelines. Our **Discretionary Fund Management (DFM)** service is specifically designed to meet the unique needs of pension clients, providing secure and compliant investment solutions that aim to maximise returns while managing risk.



This document serves as a comprehensive guide to our DFM service for pension clients. It outlines the investment parameters we adhere to, as mandated by the Financial Conduct Authority (FCA), and highlights the benefits of choosing deVere Investment as your DFM provider.

deVere Investment is a leading global financial advisory firm specialising in wealth management and investment services. With a wealth of experience and a global presence, we are committed to delivering tailored solutions that help our clients achieve their financial goals.

Understanding the deVere Investment DFM Service



What is DFM?

Discretionary Fund Management (DFM) is an investment service where a professional investment manager makes investment decisions on behalf of the client. By utilising our DFM service, pension clients can benefit from our expertise in managing their investment portfolios, allowing them to focus on their retirement goals.

Benefits of DFM for Pension Clients



Professional Expertise: Our experienced investment managers analyse market trends and make informed investment decisions to optimise returns.

Time Efficiency: By delegating investment decisions to our experts, pension clients can save time and effort.

Risk Management: We employ risk mitigation strategies and diversify investments to manage risk effectively.

Regulatory Compliance: Our DFM service ensures compliance with the FCA's guidelines for pension investments.

Our Approach to DFM Services

At deVere Investment, we adopt a personalised approach to DFM services. We understand that each client's financial goals and risk tolerance are unique, and we tailor investment portfolios accordingly. Our investment managers work closely with clients to understand their objectives, providing ongoing support and regular performance monitoring.

Investment Parameters and Compliance



Regulatory Framework: FCA and Pension Investments Pension investments are subject to strict regulations governed by the Financial Conduct Authority (FCA) in the UK. The FCA sets guidelines to protect pension clients' interests and ensure that investments are managed responsibly.

Strict Investment Parameters: At deVere Investment, we strictly adhere to the investment parameters set by the FCA. These parameters include:

Diversification: We spread investments across different asset classes to reduce risk.

Suitability: We ensure that investments align with the client's risk profile and investment goals.

Liquidity: We consider the liquidity needs of pension clients to provide access to funds when required.

Ethical Considerations: We respect clients' preferences for socially responsible and ethical investments where possible.

Risk Management and Compliance Procedures

Risk management is a critical aspect of our DFM service. We employ robust risk management techniques, including regular risk assessment, stress testing, and monitoring of investment performance. Additionally, we have compliance procedures in place to ensure adherence to FCA guidelines and other regulatory requirements.



Key Features of the deVere Investment DFM Service



Customised Investment Portfolios

We understand that pension clients have unique financial goals and risk appetites. Our DFM service offers personalised investment portfolios tailored to each client's specific requirements, ensuring a customised approach to wealth management.



Expert Investment Management

Our team of skilled investment managers has a deep understanding of market dynamics and investment strategies. They leverage their expertise to make informed decisions on asset allocation and investment selection, aiming to achieve optimal returns while managing risk.



Regular Performance Monitoring

We closely monitor the performance of investment portfolios and provide regular updates to pension clients. Our reporting includes detailed analysis, ensuring transparency and enabling clients to track their investments' progress.



Transparent Reporting

We believe in maintaining transparency with our clients. Our reporting includes clear and comprehensive information on investment performance, fees, and any changes made to the investment portfolio. We are committed to keeping our clients informed and engaged in their investment journey.

Why choose deVere Investment for DFM Services?



Experience and Expertise

With a solid track record in the financial industry, deVere Investment has a proven track record of delivering successful investment outcomes for our clients. Supported by an Executive Directors team who collectively bring over 75 years of international advice and experience, our leadership is anchored in wisdom and seasoned insights.



Global Presence

As a global financial advisory firm, we have a wide network of offices and experts worldwide. This global presence enables us to leverage local market insights and diversify investments across various regions and asset classes, providing our clients with access to international opportunities.



Client-Centric Approach

At deVere Investment, our clients are at the centre of everything we do. We prioritise understanding their individual needs and goals, allowing us to create tailored investment strategies that align with their unique circumstances.



Industry Recognition

We have received industry recognition for our excellence in wealth management and investment services. These accolades serve as a testament to our commitment to delivering high-quality solutions to our clients.

Getting Started with the deVere Investment DFM Service

Initial Consultation and Goal Setting

We begin our DFM service by conducting an initial consultation with each pension client. During this meeting, we discuss your financial objectives, risk tolerance, and any specific requirements or preferences you may have. This information helps us create a customised investment plan that aligns with your goals.



Onboarding Process

Once you decide to proceed with our DFM service, we guide you through the onboarding process, which includes necessary paperwork and account setup. Our team will keep you informed and address any queries or concerns you may have during this stage.

Continuous Support and Communication

We believe in establishing long-term relationships with our clients. Throughout our partnership, we provide continuous support and regular communication to keep you informed about your investment performance, address any questions, and make adjustments to your portfolio as needed.

Conclusion

deVere Investment offers a comprehensive DFM service specifically designed for pension clients. With a focus on regulatory compliance and strict investment parameters set by the FCA, we provide personalised investment portfolios, expert investment management, regular performance monitoring, and transparent reporting.



Pension Management DFM



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