



OUT OF THE ORDINARY

The Power of Partnerships

Getting the best out of Asset Management

Rob Travis

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Senior Investment Director



1. Long-Term Partnership & Collaborative Working

Working alongside you & your professional advisers, for the benefit of your members

The Mutual Way

We wholly believe and support operating in 'The Mutual Way', committing to ensuring we work in the best interests of Societies and your members.

Bespoke Proposition

Both from a portfolio construction perspective and a service perspective e.g. meetings / reporting

Collaboration with other advisers

You and your professional advisers would have direct access to the specialist financial mutuals team, ensuring a three-way dialogue to provide optimum solutions for you

Extension of your business

We want to understand the challenges / opportunities you face and the impact that your assets have on your business and vice versa

Proactivity / Adding Value

We look to be proactive not only in relation to the management of your assets but also how we interact with you to ensure that we are continually adding value for your members



2. Long-Term Partnership & Collaborative Working

Examples of added value for you and your members

CPD / Training

Tailored CPD events for your Board / Investment Committee, covering both Investment and Non-Investment related subjects e.g. ESG, Impact of Artificial Intelligence, the Energy Transition

ESG / Sustainability

Our Sustainability approach commenced over 20 years ago; happy to leverage that experience for the benefit of Societies e.g. Tanya dos Santos, Global Head of Sustainability webinar

Investec Bank

By virtue of our association with Investec Bank, we are able to utilise that relationship on behalf of Societies to provide access to banking services including corporate Cash deposits, FX service and private banking

Product Development

Help Societies develop products to support your members' saving requirements through Capital Market Assumptions (CMAs) and thematic insight e.g. Sustainability

Investec Expertise

Happy to provide insight / access to other areas of the Investec business to assist with any challenges / opportunities you may face e.g. Marketing support



Thank you



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Mike Perry

Mutual Respect

