

CASE STUDY

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Congregation improves stewardship,
reduces fees and feels greater confidence
with independent oversight on the
management of their assets.

The Client Challenge

Unsure as to whether their assets were invested in the right place or not, our congregation client's leadership team struggled for many years dealing directly with fund managers. They were not confident conversing in the language of the investment world and felt there was an ever widening gap between the Mission of their Congregation and the time and effort required to monitor fund managers.

Our Solution

We created a stewardship process that shifted the focus from fund managers and products to meeting the needs of the Congregation. Our detailed analysis of their fund managers also ensured that the investment products being used were aligned with the charism of the Congregation.

A finance subcommittee was established with a clearly defined objective and a concise set of policies and procedures, to ensure better governance and reduced but more effective Congregation leadership team time input. This also provided additional peace of mind to the team that experts were representing their needs, identifying any risks or inefficiencies and constructively challenging fund managers.

The Results

The Congregation now benefits from a structured process whereby the fund managers all report to the finance subcommittee in a format that is both useful and comprehensible. Acuvest hold the fund managers to account on the products they are investing the Congregation's assets in and the associated costs. This has delivered better stewardship and an alignment of how assets are invested with the work they are facilitating, all at a lower cost.

What the client said:

"To have investment experts representing our needs in dealing with fund managers has simultaneously upgraded our stewardship and freed up time for the Leadership Team, both of which are a great reassurance and of huge benefit to our Congregation. With this independent oversight, we now feel more confident when it comes to our investments".

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Acuvest Limited

SOME OF OUR CLIENTS

 Smurfit Kappa



 Irish Blood Transfusion Service

 Jones Engineering Group
















Udarás Aerfort Éireann Átha Cliath
Dublin Airport Authority





 Dominican Sisters Cabra

 Irish Dentists' Approved Retirement Savings


Construction Workers Pension Scheme



