

Hymans Robertson Professional Trustee Programme

Selecting a Professional Independent Trustee or Sole Trustee for your Pension Scheme.

What is the Hymans Robertson Professional Trustee Programme?

A structured, independent process that supports Sponsors and Trustees in selecting a Professional Independent Trustee for their pension scheme. This could be for a Sole Trustee, Trustee Chair or Co Trustee appointment.

We are happy to offer this service to existing clients.

We see the benefit of supporting our clients and prospects in getting the best possible outcome for their Scheme.

Why choose us to run your process?

- We take the time to understand you and your specific requirements for your scheme.
- We agree a timeline up front that aligns with your needs and gives you a full understanding of the part you play in the process and the time commitment required.
- We fully articulate the Professional Trustee landscape and the different offerings available.
- We have relationships across the market and central contact(s) to ensure you gain access to the most suitable candidates.
- We do not select or direct you to any specific firm or individual.
- Our role is to support you and it is your decision as to which firms and individuals are selected to progress at each stage of the process.
- We run the full process saving you time and effort.

Hymans Robertson kindly partnered with us to help us to identify a professional sole corporate trustee for our defined benefit pension scheme. The excellent Lisa Whitfield provided us much-needed insight and advice on the market, based on her wide-ranging and thorough knowledge of the sector. Lisa also ensured that we provided the right information at the right time to get the optimum impact from our tender and kept us focused and on schedule to complete the process to a tight deadline. Thanks to Lisa's energy and support we were able to identify a strong longlist of firms, all of whom provided good proposals, and a subsequent shortlist of firms to meet in person, all of which were potentially appointable. Lisa ran a great process for us – she made everything feel effortlessly smooth and allowed us to make a great appointment. I would highly recommend working with Lisa and Hymans.

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Chief Executive

Lisa Whitfield recently managed the process of selecting and appointing a professional trustee as Deputy Chair for two of my pension schemes. The largest scheme being circa £2bn. The process from start to finish was clearly mapped out enabling Lisa to carry out initial selection to derive a long list of 6 trustees from different trustee firms. We then shortlisted for interviews and the final two met the sponsor before a final decision was made. Lisa was brilliant throughout, using her contacts and having a client focused, professional approach throughout. I have no hesitation recommending Lisa

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Chair of Trustees

A really clear process, I knew exactly what was happening and when. The process kept to a tight timescale, which as the person being interviewed, I was very grateful for as I wasn't left hanging. Lisa's steer as to the areas to focus on were very clear from RFP to interview stage and the scoring reflected that. So, end to end I felt the process was very effective. Lisa also gave a good sense of the personalities and backgrounds of the trustees. The trustees were well briefed and prepared and asked some challenging questions. The scoring and narrative were very clear, and I could see the areas I need to work on as well as those I scored well on. Lisa was able to give us a good steer on best fit for the client, which meant we could put our best foot forward. I honestly don't think there was anything I would change about the process, if only they were all like that!

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Professional Independent Trustee

Contact us to find out more



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