

Case study / DC pension scheme

ITM were appointed by the trustees of a Defined Contribution pension scheme to advise and conduct on the transfer of scheme assets to a new investment manager.

Facilitating the transfer of scheme assets to a new investment manager

- ▶ **Data management solutions audit**
- ▶ **Administration health check**
- ▶ **Administration strategy and operations review**
- ▶ **Resource services**
- ▶ **Service level agreement and cost review**
- ▶ **Process efficiency**

Solution delivered...

Trustees of a large DC scheme wished to transfer their assets to a new investment manager and unbundle their administration (switch to a new TPA). This complex project involved a range of consultants including specialist investment and communications advisors.

ITM worked in partnership with a multi-disciplinary team to rapidly resolve problems with extracting complex DC historic data from an insurer's legacy system. This ensured the data migration was undertaken accurately and that the new administrators were able to 'go live' within a critical time path aligned to the asset transfer and member communications.

//
Email info@itmlimited.com
to find out more.

//

// Faced with multiple strategic challenges relative to the asset transfer and member communications, it would have been quite possible to overlook the risks inherent in the data and administration transfer. ITM provided valuable consulting advice together with skilled independent technical assistance to ensure the overall asset and administration transfer ran smoothly. //