

# We Review. We Advise. We Guide.

## Advising charities on investment management

Portfolio Manager Consultancy Ltd (PMCL) is an investment consultancy business set up by Edward Jewson to advise charities on their investment portfolios by reviewing their fund managers. The consultancy, through its knowledge of the investment world and a good understanding of the needs of UK charities, sets out to assist charity trustees in achieving the best out of their fund managers. [Read more](#)

**CONTACT**  
  
**Phone:**  
+44 (0) 20 7866 2534  
  
**Email:**  
info@pmclconsulting.com

### INVESTMENT POLICY

We see investment policy as a cornerstone of effective investment management and successful relationships with fund managers. We review investment policy and ensure it is truly aligned with a charity's investment...

[Learn more about Investment Policy](#) →

### MONITORING INVESTMENT & PERFORMANCE

We assist charities in monitoring of their investment management and conduct regular reviews of fund manager service and investment performance. We perform a thorough and detailed analysis of charity portfolios, concentrating on the levels...

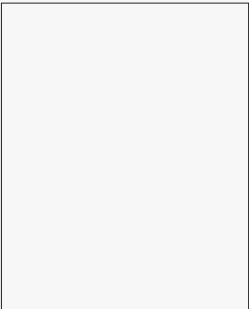
[Learn more about Investment & Performance](#) →

### FUND MANAGER ARRANGEMENTS

We assist charity trustees on assessing their fund manager arrangements as a part of regular monitoring or bespoke projects. Where trustees come to a decision to intervene and change their fund managers, we will carry out a...

[Learn more about Fund Manager Arrangements](#) →

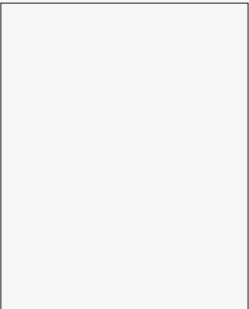
## Our Team



**Edward Jewson**

Title

edward@pmclconsulting.com  
+44 7770 638 907



**Tatyana Mursalimov**

Title

tatyana@pmclconsulting.com  
+44 7770 638 907

## News

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[Read more](#)

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# What we do

## INVESTMENT POLICY

We see investment policy as a cornerstone of effective investment management and successful relationships with fund managers. We review investment policy and ensure it is truly aligned with a charity's investment goals and objectives. We work with [charity] trustees to understand short-term and long-term funding needs and investment objectives. We assess charity investment risks and develop a most suitable approach to managing these risks. We develop our recommendations on strategic asset allocation, risk policy, investment targets, benchmarks and criteria to assess fund manager performance. We also consider ethical and other constraints to investments and advise on the ways to incorporate these without compromising on investment performance.

## MONITORING INVESTMENT & PERFORMANCE

We assist charities in monitoring of their investment management and conduct regular reviews of fund manager service and investment performance. We perform a thorough and detailed analysis of charity portfolios, concentrating on the levels of returns and volatility compared to the targets and benchmarks set out in the charity investment policy document. We also compare investment returns, manager service and fees to the industry best practices to ensure that our clients achieve the best performance from their fund managers. We interview fund managers on behalf of charity trustees and provide a full assessment report, either on a quarterly, half yearly or annual basis. The report includes a full and objective analysis of a charity's investment management arrangements, highlighting areas of strong performance, as well as drawing attention to any shortcomings. We discuss such areas of concern with the trustees and endeavour to rectify these areas by meeting the managers on the trustees' behalf.

## FUND MANAGER ARRANGEMENTS

We assist charity trustees on assessing their fund manager arrangements as a part of regular monitoring or bespoke projects. [In case when]Where trustees come to a decision to intervene and change their fund managers, we will carry out a beauty parade of suitable managers with the view to finding a replacement.

The process would be to approach a number of suitable managers based on client's preferencesand our suggestions to create a long list of potential managers. We work with the trustees to develop a request for proposal (RFP) that would address a charity's specific investment goals. We then interview the managers on behalf of the trustees and provide our summary report that would highlight areas of concern and merit and then create a short list of managers. We construct a composite benchmark and co-ordinate the beauty parade of normally four [4] candidates.

For more information on any of the above please [get in touch](#) ➔

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