

# PORTFOLIO MANAGER CONSULTANCY LTD

Charity specialist investment consultants

## Impartial professional investment consulting for charities and endowments

### Charity specialist investment consultants

We are focused on the charity sector with a deep understanding of charity portfolio management and expertise in global investment research. We offer flexible and tailored services for the individual needs of each charity, rather than packaged solutions.

### Impartial advice

We are not affiliated to any fund management group and only receive our remuneration from our clients.

### Professional service

Portfolio Manager Consultancy Ltd (PMCL) is regulated by Financial Conduct Authority (FCA), which we view as a matter of good governance, compliance discipline and professionalism. The regulatory status enables us to broaden our investment consulting services benefiting our charity clients

**We aspire to challenge the existing status-quo to ensure that the investment process is truly aligned with the particular needs of our clients**

[www.pmciconsulting.com](http://www.pmciconsulting.com)

t: +44 (0) 20 7866 2534

[info@pmclconsulting.com](mailto:info@pmclconsulting.com)

Portfolio Manager Consultancy Ltd is an appointed representative of Thornbridge Investment Management LLP, which is authorised and regulated by the Financial Conduct Authority

# OUR TEAM

## Edward Jewson

Founder, Director and shareholder



[edward.jewson@pmclconsulting.com](mailto:edward.jewson@pmclconsulting.com)  
m: 07770 638907

Edward Jewson has more than twenty years experience in assisting charities in their investment management arrangements, including investment strategy, strategic asset allocation, manager selection, review and monitoring.

He set up a successful investment consultancy business, Jewson Associates, over twenty years ago, which was advising some of the largest and prestigious charities in the UK.

He sold the business to Stanhope Capital LLP in 2011, where he became a partner and Head of Stanhope Jewson.

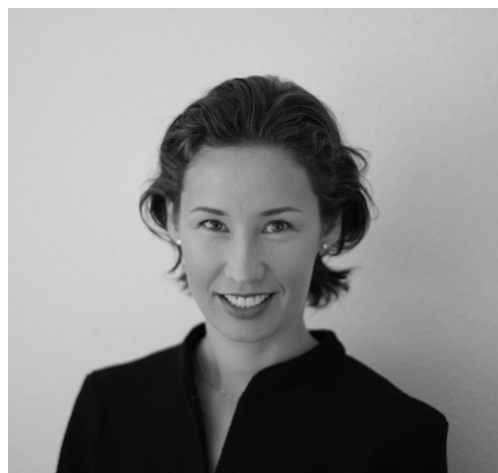
## Tatyana Mursalimov

Director and shareholder

Tatyana has professional background in finance and investments through various roles in global investment research, strategy planning and consulting. Prior to joining PMCL, Tatyana was an Executive Director at Goldman Sachs Global Investment Research for eight years.

Tatyana is an Associate member of Chartered Institute for Securities and Investments (CISI).

Tatyana's structured approach to analysis and considerable research skills will enable clients to make sound judgements on their investment arrangements. Tatyana's institutional background brings a fresh focus on charity investment management.



[tatyana.mursalimov@pmclconsulting.com](mailto:tatyana.mursalimov@pmclconsulting.com)

# WHAT WE DO

## INVESTMENT POLICY

---

We see investment policy as a cornerstone of effective investment management and successful relationships with fund managers. We believe that an investment policy should be beyond formal and be truly reflective of a charity's particular financial objectives and constraints.

We work together with our clients to get their aspirations and requirements from the investment portfolios. We help our clients put their investment portfolios into the context of the broader financing plan.

We focus on investment approach and objectives, investment returns and risks. We can advise on strategic asset allocation and benchmarks for performance monitoring. We also consider ethical and other constraints to investments and advise on the ways to incorporate these without compromising on investment performance.

## FUND MANAGER REVIEW & MONITORING

---

We enable charities to monitor their investment management arrangements and conduct regular reviews of their fund managers' service and investment performance. We provide consolidated reporting where portfolios are managed by more than one fund manager.

We perform a thorough quantitative and qualitative analysis of charity portfolios and fund manager arrangements. We focus on investment returns, risks, manager service and fees to ensure that our clients have the greatest opportunity to achieve the best performance from their fund managers.

We interview fund managers on behalf of our clients and provide a full assessment report, either on a quarterly, half yearly or annual basis.

We help our clients keep abreast of current legislation, developments in the fund management industry and best practice.

## CONDUCTING MANAGER SELECTION

---

We assist our clients on assessing their fund manager arrangements as part of regular monitoring or bespoke projects.

Where trustees come to a decision to change their fund managers, we will carry out a beauty parade of suitable managers with the view to finding an appropriate replacement.

We create a recommended list of potential managers based on our research and our client's preferences. We work with the trustees to develop a request for proposal (RFP) that addresses a charity's specific investment goals.

We then interview the managers on behalf of our clients, provide our summary report and co-ordinate the beauty parade of the candidates.

# CONTACT US

---

[www.pmciconsulting.com](http://www.pmciconsulting.com)    t: +44 (0) 20 7866 2534    [info@pmciconsulting.com](mailto:info@pmciconsulting.com)

---

## Disclaimer

*The contents of this document are communicated by, and the property of, Portfolio Manager Consultancy Ltd.*

*Portfolio Manager Consultancy Ltd. is a company incorporated in England with company number 10777184 and a registered office at Woodwater House, Pynes Hill, Exeter, EX2 5WR. Portfolio Manager Consultancy Ltd is an appointed representative of Thornbridge. Thornbridge is a trading name of Thornbridge Investment Management LLP which is authorised and regulated by the Financial Conduct Authority ("FCA").*

*The information and opinions contained in this document are subject to updating and verification and may be subject to amendment. No representation, warranty, or undertaking, express or limited, is given as to the accuracy or completeness of the information or opinions contained in this document by Portfolio Manager Consultancy Ltd or its directors. No liability is accepted by such persons for the accuracy or completeness of any information or opinions. As such, no reliance may be placed for any purpose on the information and opinions contained in this document.*

*The information contained in this document is strictly confidential.*

*Users are permitted to read the contents of the presentation and make copies for their own personal use. They may also give copies (in paper or electronic form) of reasonable extracts on an occasional basis free of charge to colleagues and clients for their personal use, on terms that (i) Portfolio Manager Consultancy Ltd. is acknowledged as the source, (ii) the text is not altered in any way and (iii) the attention of recipients is drawn to this disclaimer. All other use and copying of any of the contents of this presentation is prohibited unless the prior written consent of Portfolio Manager Consultancy Ltd. is obtained.*

*The value of investments and any income generated may go down as well as up and is not guaranteed. Past performance is not necessarily a guide to future performance.*

*The information provided does not constitute investment advice and should not be relied on as such. It should not be considered a solicitation to buy or an offer to sell a security. It does not take into account any investor's particular investment objectives, strategies, tax status or investment horizon.*

---

[www.pmciconsulting.com](http://www.pmciconsulting.com)    t: +44 (0) 20 7866 2534    [info@pmciconsulting.com](mailto:info@pmciconsulting.com)