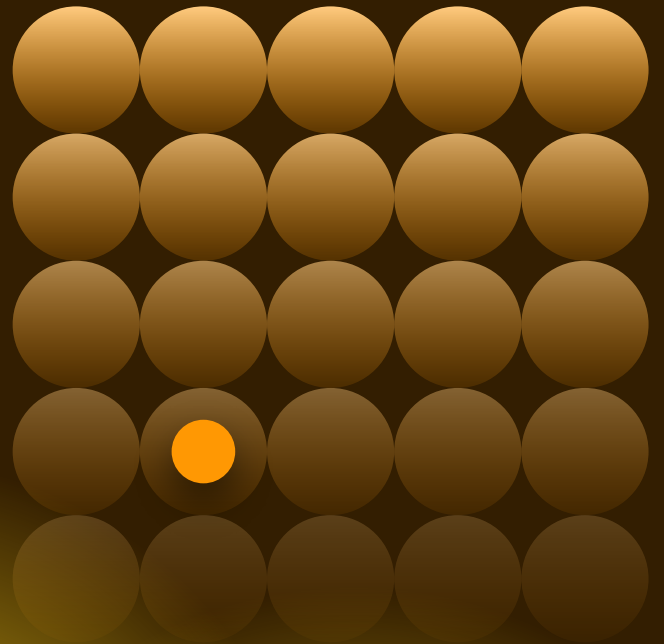


# Manager selection

CFA and CISI-accredited investment experts delivering a best-in-class manager selection service to you and your clients.



## INVESTMENT CONSULTANCY FOR TRUSTEES

Fragmented advice and unclear fees lead to bad investment outcomes. Select makes good outcomes more likely.

Select is different. We're independent Investment Consultants who work exclusively with trustees, combining expert manager selection with ongoing portfolio oversight through our governance platform. No product-pushing. Just one consultant, one platform, transparent fees and better outcomes for you and your clients.

## INVESTMENT CONSULTANCY AT A GLANCE

\$5bn+

Assets under advice

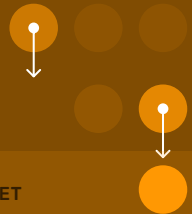
800+

Investment managers

100+

Clients on platform

### MANAGER RESEARCH: THE 5P SELECTION PROCESS



#### PERFORMANCE

We only consider managers with strong risk-adjusted returns versus their benchmarks and peer groups, and filter out managers with substandard track records.

#### PROCESS

We evaluate how managers generate returns and whether their approach can be repeated consistently. A strong process is the best indicator of future performance.

#### PEOPLE

Investment teams matter. It is people who ultimately manage money. We assess the experience, flair, diversity and stability of the teams we invest with.

#### PRICE

Fees impact performance. We negotiate competitive rates for our clients whilst ensuring managers remain appropriately incentivised to deliver.

#### PLANET

ESG (environmental, social and governance) must be integrated into investment decisions and corporate culture, not just documented in policies. We look for proof.



Select

# Consultancy that connects the investment dots

## Objectives evaluation

Our Investment Consultants conduct a thorough investment objectives evaluation to understand your investment aims, risk tolerance, and fiduciary responsibilities.

## Investment policy

We formalise your objectives into a clear investment policy statement – the blueprint that guides every decision and keeps your portfolio aligned with your fiduciary duties.

## Manager selection

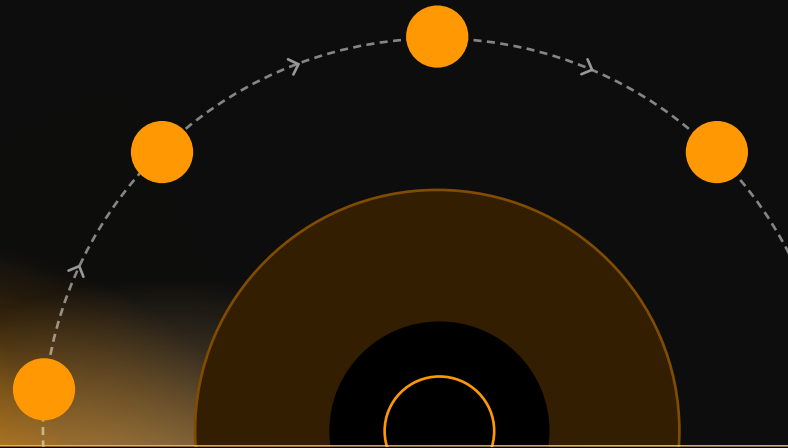
Our Research Team uses a disciplined 5P process to identify leading investment managers. Your consultant selects from this approved list to build a portfolio that matches your policy.

## Portfolio structuring

Select is implemented on a leading Swiss private banking platform integrated with Connect – centralising your investments and offering access to competitive lending, cash management and foreign currency solutions.

## Review meetings

Leveraging Connect, we monitor your portfolio and meet regularly to ensure your investment policy remains fit for purpose. As conditions change, we review and adapt – completing the cycle and starting again.



## Next steps



Enquire

Factsheet

Presentation

Proposal

Forms

Engage

The next step is for Enhance to provide a personalised presentation to introduce our Select service.

## Get in touch

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