

INVESTMENT ORGANISATION

INVESTMENT ORGANISATION UNDER BEST-PRACTICE CONDITIONS

Optimal implementation of the investment strategy

We help you implement your investment strategy with the best possible price-performance ratio. On the basis of a detailed and mandate-specific analysis, the managerial performance of the current structure is evaluated and optimisation potential and recommendations for action are identified.

Mandate structure including task specifications

Recommended mandate structures are comprehensively defined – including a cascade of responsibilities and clear task specifications.

Content of regulations

Service enhanced by adapting the investment regulations to the new structure and current legislation.

YOUR BENEFITS, OUR PROMISE

Efficient structures

A transparent, incentive-based investment organisation that enables cost- and tax-efficient implementation of the investment strategy in the interests of all insured parties.

Best practice

Compliance with best-practice principles (separation of powers, transparency and competition) is ensured to support the management body in complying with its legal obligations.

INTERESTED?

REFERENCES



Dr. Benita von Lindeiner
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Daniel Roth Mauritius Pensionskasse

“In the context of the merger of two pension funds, c-alm has brilliantly mastered the organisational investment challenges in this process.”

Leonhard Nold Pensionskasse Stadt Chur

“c-alm provided us with professional support during redesign of the investment organisation, from amendment of the regulations all the way to the mandate tender.”

