



PRESS RELEASE: FOR IMMEDIATE RELEASE

Cartwright appoints Head of Investment Implementation

15 March 2023

Cartwright, the pension specialist for defined benefit and hybrid schemes, today announced the appointment of Steve Robinson as Head of Investment Implementation for the firm.

Sam Roberts, Director of Consulting at Cartwright, said: "The industry continues to undergo a huge evolution, at a rapid pace, so we want to continue to ensure our clients are always able to access the most cutting edge services, insight and expertise. Following the funding improvements of last year, which saw over 1000 schemes now having a buyout surplus and with many more within touching distance, we're expecting a further increase in de-risking and bulk annuity activity. And, given the more volatile economic environment we're now in, speed is becoming even more important to our clients to lock in gains and better secure trustee and employer goals - we're transacting schemes in as little as a month. At Cartwright we pride ourselves on remaining a step ahead. This is a new role for us and one which will really bolster our team in the critical area of asset transitions; helping us to continue delivering for our clients in the way they rightly expect.

"As Head of Investment Implementation, Steve will lead the way in proactively identifying and assessing our clients' risks and opportunities for asset transitions and other types of strategy design and implementation, and we look forward to him being part the team."

Robinson added: "Cartwright is a growing firm with a first-class reputation – championing innovative and pragmatic solutions for their clients. I'm really looking forward to working with the team, and our clients, on harnessing the opportunities the market is currently offering as well as taking our expertise into new areas such as Charities and Funeral Trusts."

Steve joins from Mobius Life where he spent four years as Head of Asset Transfers and latterly two years as Implementation Director. Steve was also at BlackRock, where he was Vice President responsible for designing, implementing and managing asset transitions for BlackRock's platform clients, and at Mercer Investment Consulting, where he managed the asset transition function. Steve is a holder of the IAQ, IMC and is a qualified PRINCE2 Practitioner.

Note to Editors:

Cartwright is an independent privately-owned pension actuarial, investment consulting, consultancy and administration firm. Established in 1986, with offices in Godalming, Chelmsford, and Farnborough, they provide actuarial and investment advice, pensions consultancy and administration services to over 200 clients; including trustees and sponsors who are seeking to manage their pension schemes effectively and efficiently. Originally formed to fill a gap in the market, their pioneering spirit remains at the heart of the company to this day.

Cartwright have grown by putting clients at the centre of everything they do. They're dedicated to delivering pragmatic solutions, operating with the highest degree of professionalism and integrity. Renowned for not offering a one size fits all service, they specialise in small and medium-size schemes wanting access to expert services and solutions, delivered at a competitive price and with a personal and bespoke touch.

More information can be found on the website:

<https://cartwrightbenefits.co.uk>

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