



Punter Southall
GROUP

Providing a unique combination of actuarial, pensions consultancy, administration and investment services specifically for ...

Pension scheme trustees

Employers

Private clients

Institutions



About us

Punter Southall was established in 1988 by Jonathan Punter and Stuart Southall to provide actuarial and investment advice to UK pension schemes. The business was originally set up to introduce a fresh, competitive presence to a largely static pension services market and primarily to put client service first. These guiding principles have not changed.

With over 700 staff in our Group, we react swiftly to regulatory change and stay at the forefront of developments in the industry.

The culture of our firm is built on the bedrock of strong relationships with our clients, other professionals and our staff. We are collaborative in our approach and create an environment in which we can enjoy working with our clients. We value innovative and creative thinking and most of all have a passion for what we do. We deliver on our promises and our client satisfaction feedback is testament to this.

Our proven track record

Our approach to innovative financial solutions has attracted clients from a broad spectrum of UK businesses, charities, unions and institutions. Our pension scheme clients range in size from around 20 members to over 100,000 members and from owner-managed businesses to industry-wide schemes.

Entrepreneurial spirit

Punter Southall Group is ambitious and entrepreneurial. What truly sets us apart is that many of our senior people have at some point in their lives set-up and run their own businesses. This real world experience combined with our depth of actuarial and investment resources means that our advice and financial solutions will always be innovative and commercial.

Key facts about Punter Southall Group

700 staff in 11 locations throughout the UK

1,000 companies and trustees of pension schemes receiving services including: actuarial, administration, investment, employee and risk benefits advice

4,000 private clients

106,000 occupational pension scheme members administered by us

£91m Group turnover in 2008

£6.25bn assets under management

£16bn assets under advice

An overview of our services

Pension scheme trustees

- Scheme actuary
- Investment advice
- Delegated investment management
- Scheme administration
- Secretarial services
- Independent trustees

Private clients

- Independent financial planning advice
- Wealth management
- Unit trust management
- Advice to trustees
- Advice to partners and partnerships
- International financial advice

Employers

- Company actuarial advice
- Transaction actuarial advice
- Defined contribution consulting
- Employee benefit consulting
- Group risk and healthcare consultancy
- Flexible benefits consulting
- Communications
- Executive remuneration advice

Institutions

- Asset management
- Risk management
- Fund of hedge funds management
- Unit trust management

Award winning

In 2009, Punter Southall Group was awarded **'Actuarial and Investment Advisory Firm of the Year'** in the ACQ Awards.

Punter Southall's Transactions Services team was awarded **'Pensions and Actuarial Due Diligence Provider of the Year'** in May 2008 and **'Pensions and Actuarial Due Diligence Provider of the Year – UK'** in May 2009 by ACQ Finance Magazine.

In October 2008, Punter Southall's Transactions Services team was also awarded **'Pensions Due Diligence Firm of the Year'** at the third annual Private Equity News Awards for Excellence in Advisory Services.

Punter Southall is the only actuarial firm listed in the Managing Partners' Forum (MPF) **'100 Best Professional Firms to Work For 2008'** Report. This is a league table of professional firms ranked by employee engagement that surveyed over 700,000 employees and is used by The Sunday Times to compile their 'Best Companies To Work For' list.





Consulting actuaries and pensions administrators
www.puntersouthall.com



Actuarial services in corporate transactions
www.pstransactions.co.uk



Independent Financial Advisers
www.psfm.com



Investment consultants and asset solutions
www.psolve.com



Wealth managers
www.psigmainvestments.com



Institutional and retail asset managers
www.psigma.com



Independent pension scheme trustee services
www.psitl.com

Punter Southall Group operates from the following locations

Aberdeen

Suite 3, 56 Queen's Road, Aberdeen AB15 4YE
Tel: 01224 498 500 · Fax: 01224 498 505
Email: peter.young@psfm.com

Birmingham

1 Colmore Row, Birmingham B3 2BJ
Tel: 0121 230 1900 · Fax: 0121 230 1901
Email: nigel.wilmin@puntersouthall.com

Bolton

Suite 35, Bolton Business Centre
44-46 Lower Bridgeman Street, Bolton BL2 1DG
Tel: 01204 380687 · Fax: 01204 380687
Email: jane.kelly@psfm.com

Bristol

1 Friary, Temple Quay, Bristol BS1 6EA
Tel: 0117 344 5070 · Fax: 0117 344 5071
Email: gary.davies@puntersouthall.com

Cardiff

2nd Floor, Unit 1B, Oak Tree Court, Mulberry Drive,
Cardiff Gate Business Park, Cardiff CF23 8RS
Tel: 029 2054 6360 · Fax: 029 2054 6361
Email: carol.cranmore@psfm.com

Edinburgh

Charlotte House, 2 South Charlotte Street, Edinburgh EH2 4AW
Tel: 0131 225 1155 · Fax: 0131 220 3828
Email: gerry.devenney@puntersouthall.com

Guildford

Tempus Court, Onslow Street, Guildford, Surrey GU1 4SS
Tel: 01483 540 300 · Fax: 01483 540 301
Email: neil.lalley@puntersouthall.com

London (Head office)

126 Jermyn Street, London SW1Y 4UJ
Tel: 020 7839 8600 · Fax: 020 7839 3343
Email: alison.bostock@puntersouthall.com

Maidstone

Idenden House, Medway Street, Maidstone, Kent ME14 1JZ
Tel: 01622 357 250 · Fax: 01622 357 251
Email: david.cowlen@psfm.com

Redhill

Gatton Place, St Matthews Road, Redhill, Surrey RH1 1TA
Tel: 01737 854 440 · Fax: 01737 854 445
Email: ann.phillips@psfm.com

Wokingham

Albion, Fishponds Road, Wokingham, Berkshire RG41 2QE
Tel: 0118 977 2277 · Fax: 0118 977 2278
Email: jenny.gallagher@puntersouthall.com

We also have a sister business in Boston, USA.

For further information, visit our website at www.puntersouthallgroup.com

Punter Southall Group is a trading name of Punter Southall Group Limited - Registered office: 126 Jermyn Street, London SW1Y 4UJ - Registered in England and Wales No. 4096788

Punter Southall is a trading name of Punter Southall Limited - Registered office: 126 Jermyn Street, London SW1Y 4UJ - Registered in England and Wales No. 3842603

Punter Southall Transaction Services is a division of Punter Southall Limited - Registered office: 126 Jermyn Street, London SW1Y 4UJ - Registered in England and Wales No. 3842603

Punter Southall Financial Management is a trading name of PSFM Limited - PSFM Limited is authorised and regulated by the Financial Services Authority - Registered office: 126 Jermyn Street, London SW1Y 4UJ - Registered in England and Wales No. 2148740

P-Solve is a division of PSigma Investments Limited, authorised and regulated by the Financial Services Authority and a member of the IMA - Registered office: 126 Jermyn Street, London SW1Y 4UJ - Registered in England and Wales No. 3359127

PSigma Unit Trust Managers Limited is authorised and regulated by the Financial Services Authority - Registered office: 126 Jermyn Street, London SW1Y 4UJ - Registered in England and Wales No. 04569694

PSigma Asset Management is a trading name of PSigma Asset Management Holdings Limited. Registered office: 126 Jermyn Street, London SW1Y 4UJ - Registered in England and Wales No. 05374635

PSigma Asset Management Limited is an appointed representative of PSigma Investments Limited which is authorised and regulated by the Financial Services Authority - Registered office: 126 Jermyn Street, London SW1Y 4UJ - Registered in England and Wales No. 05375371

PSigma Investment Management is a trading name of PSigma Investment Management Limited, authorised and regulated by the Financial Services Authority and a member of the IMA - Registered office: 126 Jermyn Street, London SW1Y 4UJ - Registered in England and Wales No. 5374633

PS Independent Trustees Limited - Registered office: 126 Jermyn Street, London SW1Y 4UJ - Registered in England and Wales No. 3021321