

Investment guidance
delivered by an experienced
advisor to Taft-Hartley
plan sponsors.

Institutional Investment Consulting

Is your defined benefit pension investment program meeting your plan's actuarial return and exceeding its benchmark net of fees? Are your welfare plan investments returning enough to offset medical inflation? Does your defined contribution plan provide participants with options to help them maximize their retirement savings? Is your investment consultant regularly and proactively addressing these issues and your concerns?



Gallagher

Insurance | Risk Management | Consulting

Our investment and fiduciary consulting services include:

- Investment policy statement
- Asset allocation
- Investment structure
- Manager due diligence and selection
- Private markets due diligence and selection
- Investment manager monitoring and performance reporting
- Investment-related administration
- Fiduciary decision-making
- Socially responsible investments
- Spending policy analysis
- Debt covenant integration

Gallagher's experience and services span a wide range of clients:

- Corporate
- Endowment and foundation
- Family trust
- Healthcare
- Higher education
- Not-for-profit
- Public
- Religious
- Taft-Hartley

Labor and management are collectively faced with the challenge of remaining competitive in today's marketplace. All this in a world where the financial markets are increasingly complex, volatile and in a constant state of change.

For nearly 40 years, the Investment & Fiduciary Consulting practice of Gallagher has provided proactive consulting solutions to sponsors of Taft-Hartley fringe benefit plans. Our holistic and dynamic approach is built on consistently delivering results-oriented, conflict-free investment guidance.

Taft-Hartley experience

As a trustee, you are charged with a multitude of fiduciary responsibilities, usually on top of your day-to-day duties as a union or management representative. It is critical that you partner with an experienced advisor who understands and appreciates the unique challenges you face. Further, you need someone who shares your values — someone committed to the wellbeing of your participants and to strengthening your industry. Our consultants are seasoned professionals in designing and implementing investment solutions, managing liquidity requirements, and effectively communicating the investment principles of the portfolio. We work in collaboration with your legal and administrative professionals to help ensure investment matters are handled prudently and expeditiously, allowing you to focus your energy on your core responsibilities with the experienced support you need.

Proactive, custom solutions

As your circumstances change and the financial markets evolve, so will your investment program. Whether that means adjusting your asset allocation, replacing an investment manager or adding a new asset class for diversification, we will proactively deliver value-enhancing guidance, implemented cost-effectively and efficiently. Our approach is customized, adaptive and tailored to your needs and objectives. We offer investment consulting solutions while serving in an advisory (traditional) capacity or in a discretionary Outsourced Chief Investment Officer (OCIO) capacity. Other specialized services include summary investment reviews and one-time or ongoing assignments requiring an independent fiduciary.

Talk to a Gallagher investment and fiduciary consulting professional today. Let us develop and implement a custom solution for you.

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