

OUR SERVICES

# RISK TRANSFER, BULK ANNUITY & CONSOLIDATOR ADVICE

At DWA, we provide bespoke advice and broking services to trustees and pension schemes, while always prioritising their needs. Our independent approach guarantees optimal results and we cater to clients of all sizes - large, small or from other consultancies.



## Strategic Partnerships for Enhanced Solutions

**At DWA, we collaborate with like-minded firms to support their bulk annuity solutions. By aligning with their approach, we ensure their clients receive top-tier advice on bulk annuity and commercial consolidator transactions.**

Furthermore, we share our extensive market experience with our consultancy clients, providing them with industry-leading insights.

## DWA's Unique Approach

**We leverage our independent expertise to deliver optimal value and minimise risks through strategic planning, detailed execution, effective negotiation and seamless implementation.**

## Why Partner with Us?

- ✓ **Client-Centric Strategy:** We conduct rigorous due diligence to select the right provider for our clients (Trustees). We prioritise their needs over insurer requirements.
- ✓ **Post Buy-In Project Management:** We ensure smooth transitions with clear communication and efficient execution to facilitate the buy-out transactions.
- ✓ **Specialist in Transacting Private Market Assets:** We support clients in exiting assets such as private equity, private debt, private property and infrastructure as part of the risk transfer process.

## Effective Post-Buy-In Project Management

**Our structured approach ensures smooth buyout processes with clear communication and efficient execution. We assist in project planning, provide regular updates and support data cleansing, including GMP equalisation.**

We guide pension schemes through the complexities of buyout transitions and the final winding up. The DWA team's deep understanding of these processes ensures you receive comprehensive support every step of the way.

## Bulk Annuities vs. Commercial Consolidators

**Bulk annuities offer a strategic solution for managing Defined Benefit pension schemes, mitigating risks for employers, trustees, and members. Commercial consolidators provide an alternative to traditional insurance buyouts, potentially reducing costs and delivering favourable outcomes.**

To determine whether bulk annuities or commercial consolidators are suitable for your scheme, please schedule a consultation with us. Given the potential financial impact, engaging a specialist ensures the best outcomes.