



IAPF Seminar
**‘Managing Portfolio Change:
Understanding the benefits of a transition manager’**

13 July 2023 | 8.30am – 9.30am | CPD 1hr

8.30am	Welcome and Introduction Jerry Moriarty, CEO, IAPF
	Managing Portfolio Change: Understanding the benefits of a transition manager In this world, change is constant. When adjustments are inevitably made to a portfolio - whether that is to manager line up, strategic asset allocation or incorporating ESG criteria to name a few – how do you manage risk and control costs, while also maintaining investment performance and providing full transparency? At what point does it make sense to use a specialist to take on these responsibilities for you? Russell Investments in partnership with IAPF will explain the role of a specialist third party ‘transition manager’, examine how a transition manager can add value and explore when it makes sense to use one. Chris Adolph <i>Director of Customised Portfolio Solutions, Russell Investments</i>
	Q&A and further discussion
9.30am	Ends

This event will be allocated 1 CPD hour by the IAPF for on-going trustee training requirements. We have applied for 1 CPD hour from the LIA, the IOB and the IIPM under category 2. Pensions and Pension Trustee Practitioners (PTP). If you have a query relating to the CPD hours, please contact the relevant awarding bodies.

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