

Helping trustees
make better wealth
decisions more
often



ASSESS

The risks posed to both beneficiaries and trustees alike through poor wealth governance practises are extremely high.

Stewards helps trustees identify these risk by undertaking Wealth Governance Risk Assessments which identify any flaws and conflicts that are embedded in their existing processes.

ORGANISE

Stewards then helps trustees design a customised wealth governance, risk and compliance (wGRC) framework.

This framework includes the establishment of a Compliance Risk Register, an Investment Policy Statement and a due diligence process used to select and engage 3rd party specialists suppliers.

BRIEF

Using this wGRC framework, Stewards then assists trustees to better engage the trust's external specialist network.

Much in the same way that a medical GP briefs a range of specialists for their clients, Stewards helps trustees to select, engage, brief and manage the trust's brokers, lawyers and accountants.

COORDINATE

Once the trust's specialist network is selected, engaged and briefed, Stewards then coordinates the work assigned to each while managing those tasks which are shared between them.

These shared tasks often involve a wide range of financial and legal specialities across multiple professional disciplines.

IMPLEMENT

The trust's tailored wGRC framework is then used by Stewards to implement and manage the trust's asset and investment portfolios.

In order to avoid any bias, Stewards does not provide trustees with specific securities advice. Our role is to manage those 3rd party specialist who do.

MAINTAIN

Stewards then monitors the trust's portfolios providing the trustees with ongoing monitoring and reporting.

Stewards also provides ongoing strategic advice relating to the trust's assets and the maintenance of the wGRC framework that manages them for the benefit of the beneficiaries and the protection of trustees.