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Leaders in pensions

Pensions Investment

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Clients tell us they value the service our Pensions Investment Group offers: expertise and experience across all specialist investment areas and an approach which is truly integrated.



Keith Webster
Head of Pensions Investment Group
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Our experience and the quality of our service mean we:

- provide innovative and commercial legal advice across the full range of specialist investment areas
- are able to explain complex issues in a pragmatic way, helping both professional and lay clients to identify and resolve the key issues
- take a proactive approach, working with investment consultants, to ensure our clients complete their investment on budget and on time.

What we offer

Depth of resources

Our multi-disciplinary Pensions Investment Group involves over 80 lawyers who have significant experience of advising trustees on investment matters. As well as offering a market leading pensions team, the group includes lawyers from our Financial Services & Products, Capital Markets and Derivatives, Corporate and Investment Funds, Real Estate Funds and Tax teams – each of which is acknowledged as a market leader in its own right.

Innovation and experience

As pensions investment becomes more complex and dynamic, our experience gives us the insight to help clients structure and implement new investment strategies within an ever increasing regulatory framework. We work hard to understand the implications of new developments and to influence those developments. We are represented on the committees of the Association of Pension Lawyers, including holding the chair of the Investment Committee.

Industry insight

What sets us apart from other firms is our knowledge of the pensions market and the wider investment industry. Our experience gives our clients the best possible chance of delivering their transaction to completion, often within tight timescales. Because we also work for fund managers, insurers and banks, we know the key issues for each party to the transaction and so can help resolve issues as they arise.

Strong relationships

We can confidently commit to meeting our clients' needs efficiently, at the right level and in tight timescales. Our Pensions Investment Group has a track record of delivering all types of investment work including high-profile and complex transactions. Whilst our Pensions Team will usually lead the relationship with you, they will draw on the expertise and resources of other specialist lawyers who are very experienced in working with pension schemes.



If someone asked me for an excellent Pensions Lawyer, CMS would be the first name to come into my head.

a leading investment business pension scheme,
client feedback

A flavour of our expertise

We provide pensions and investment advice to over 20 pension scheme clients with assets in excess of £1bn, including the likes of BAA, Barclays, Honeywell, Sainsbury's and TUI Travel. We also act for a number of trustees only on investment work, where our expertise means we have been appointed to supplement the incumbent pensions adviser, particularly for larger schemes with complex investment arrangements, including Littlewoods, Marks and Spencer and RBS.

Our experience includes:

- advising a number of pension schemes on setting up their own FCA authorised investment managers including Railpen, Coal Pensions, RBS and Barclays
- assisting hundreds of pension fund trustees and other institutional investors on complex investment arrangements, including bespoke tax driven SPV/ pooled fund structures and OTC derivatives documentation
- advising Aon Hewitt and Towers Watson on the development of their delegated consulting and fiduciary services, involving investment management agreements, investments into funds, custody arrangements and related documentation such as ISDAs, cash and transition management
- advising pension funds and other institutional investor clients on a wide range of fund investments, encompassing venture and private equity, hedge funds, real estate and infrastructure
- advising trustees and insurers in relation to longevity transactions, buy-ins and buy-outs including acting for SCOR on the £5 billion disintermediated longevity transaction with the Aviva Staff Pension Scheme and acting for PIC on the £1.6bn buy-in of pensioner liabilities in relation to the Total UK Pension Plan
- advising on a number of innovative asset-backed funding arrangements with assets including property, brands and IP rights, financial collateral and asset-backed loan notes. Our Scottish offices include experts in the establishment of Scottish Limited Partnerships and so we are one of the few law firms who can provide all the legal advice required in relation to these transactions

RegZone

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www.cms-lawnow.com/regzone

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