

## Charles Stanley Boosts Fiduciary Management Division with Appointment of Chris Haywood

**London, UK – 7 March 2025** – Charles Stanley is pleased to announce the appointment of Chris Haywood as a Senior Portfolio Manager within Charles Stanley Fiduciary Management services. Chris joins the team today, bringing with him over 12 years of experience in the Defined Benefit (DB) pension scheme industry.

In his role, Chris will be responsible for managing and developing client portfolios within the Fiduciary Management team. He will work closely with clients to understand their unique needs and provide tailored investment solutions that align with their financial goals. Chris will also collaborate with the Charles Stanley Asset Management team, in addition to the broader research capabilities across the group, to enhance the firm's Fiduciary Management offerings and ensure the highest standards of client service. Chris will report directly to Dan James, Head of Asset Management.

Chris joins Charles Stanley from XPS Group, where he served as a Senior Investment Consultant, providing investment advice for around 20 advisory and Fiduciary Management oversight clients, ranging from £3m to £500m in size. He also played a key role in the development of the Company's Fiduciary Management oversight and Local Government Pension Scheme (LGPS) propositions, and was part of the management group for the London investment team.

Chris holds a Bachelor of Science in Geography and Statistics from the University of Newcastle.

**Dan James, Head of Asset Management at Charles Stanley, said:** *"We are delighted to welcome Chris to the Charles Stanley Asset Management team. His extensive experience and deep understanding of the industry will be instrumental in driving our growth and enhancing our Fiduciary Management services."*

Charles Stanley's Fiduciary Management service is designed to help pension trustees take control and find effective ways to meet their pension scheme's funding objectives. The service offers a bespoke strategy tailored to the unique needs of each scheme, supported by detailed asset-liability modelling tools. Clients benefit from a dynamic portfolio of bespoke growth assets managed by Charles Stanley Asset Management's expert multi-asset team, as well as a sophisticated portfolio of liability matching assets sourced both directly and from the best-in-class funds across the market.

**Chris Haywood added:** *"I am excited to join Charles Stanley and look forward to working with the team to deliver exceptional service to our clients. I am passionate about helping clients achieve their financial goals and am eager to contribute to the continued success of the Fiduciary Management division."*

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**PRESS RELEASE**

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**About Charles Stanley**

Charles Stanley is a leading UK Investment Management Company. Its origins trace back to 1792. It provides services direct to private clients, charities, trusts and professional institutions. It also works with financial advisers, legal, accountancy and other professional services firms, supporting them with their client objectives.

It is dedicated to providing clients with the highest standard of service and peace of mind at every step of their financial journey, delivered by over 800 staff located in 26 offices across the UK. Its services comprise:

- **Investment Management Services**, offering personal discretionary, advisory and execution-only services.
- **Asset Management**, providing investment solutions serving retail, institutional and intermediary clients, such as our model portfolio service (MPS), mutual funds and fiduciary management.
- **Financial Planning**, advising clients on how to plan their finances to meet current and future lifestyles.
- **Charles Stanley Direct**, an award-winning digital execution-only platform that makes investing in a portfolio of funds and shares simple and cost-effective.

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