Curriculum Vitae

Paul Bourdon
Director

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Background

Paul joined ITS as a Director from Insight Investment Management, where, amongst other things, he led the client facing team for ten years.

He has extensive experience of investments of all major asset classes, LDI, ESG, scheme funding journeys, investment strategy, end game options, risk management, and compliance/governance related matters. He had previously worked for GRE insurance, HSBC as well as Threadneedle, and Credit Suisse Asset Management running their pension solutions teams in the UK and across Europe.

He builds strong relationships, is a proven team player, has an open and curious nature and is constructively challenging. He understands investments and risk thoroughly and how these fit into the wider scheme governance and decision-making, having worked closely with numerous pension trustee boards and their sponsoring employers. He has the key ability to de-construct objectives and assess their translation into relevant solutions allowing him to provide direction and choreography to the work of advisers.

In the process of building his portfolio of trustee appointments, he is currently co-director for the Acushnet Europe scheme, which is focused on buy-in/buy-out and GMP equalisation.

Notable Experience and Client Achievements

- Using his wealth of investment knowledge, Paul has deep experience of journey planning and its execution with pension boards. This has encompassed starting from a traditional investment portfolio through to first de-risking steps using LDI and subsequent cash flow driven solutions and, in other cases, evolving strategies all the way to buy-out.
- Presented to over 30 trustee boards implementing sophisticated strategies, built strong strategic relationships, and recognised as a team player with schemes with assets ranging from £100mn to over £5bn.
- Worked with sponsors to successfully devise innovative funding strategies in line with corporate aims and the trustee’s long-term objectives including the various Babcock Group and Rio Tinto schemes.

Professional Qualifications/Awards

Paul is a Fellow of the Institute and Faculty of Actuaries.

Areas of Expertise

- ✓ Working to agree long term objectives, journey plans and de-risking
- ✓ Chairing
- ✓ Repairing/rebuilding trustee relationships
- ✓ Working to agree long-term objectives
- ✓ Mentoring lay trustees
- ✓ Risk transfer (buy in/buy out)
- ✓ Ongoing support to DB/Hybrid schemes
- ✓ Ongoing support to DC
- ✓ Ongoing support to large and/or complex schemes – perhaps in area of common trustee boards/rationalising advisers etc
- ✓ Interim appointments
- ✓ Difficult Valuation Exercises
- ✓ Expertise in Investment Strategy
- ✓ Provider review