



ABOUT PIVOT

Pivot Assets Limited has over the years supported the Pension Industry by providing independent assessment and analysis of Pension Scheme Investment Performance through the rigorous survey PIMS.

It was founded in 2019 to promote learning through various aspects of training, best practices, especially on the sphere of investment and governance. Pivot has made huge strides in the field of Pension majorly in investment consultancy & Capacity Building to various pension schemes and other corporate organizations.

We have now expanded our services to cover public and private sector organizations in management training and consultancy.

VISION

To be the leading solution centric institution in Africa.

MISSION

To develop and deliver innovative solutions through capacity building and consultancy.

CORE VALUES

Integrity, excellence, Professionalism

WORD FROM THE CEO

We are grateful and proud of the progress we made in 2022 with the help of various organizations. Pivot Assets is prepared to provide organizations with the resources they require to achieve greatness and advance to the next level. We are also prepared to organize in-house trainings tailored to your organization's specific needs. We invite you to mark your calendars for the exciting local and international programs that have been planned for 2023.

Joshua Okeyo, CIPM
CEO

Course	Date YR' 2023	Venue	Fee	Target Participants
Pension Administration and Governance summit	23rd to 27th January	Naivasha	75,000	Pension board of trustees, pension secretariat
Compliance and Risk Management for Retirement Benefit Schemes	20th to 24th February	Naivasha	75,000	Pension board of trustees, pension secretariat, HR practitioners, Finance professionals
Pension Scheme Investment and Performance Measurement	20th to 24th March	Mombasa	69,500	Pension board of trustees, pension secretariat, Investors, Finance professionals
Retirement benefit Congress	27th to 31st March	Dubai	150,000	Board members, CEOs, Trustees, CFOs, HR Professionals, Pension secretariat, Scheme administrators
Enterprise Risk Management	13th to 17th March	Naivasha	75,000	Risk and Internal Audit Professionals, Finance Professionals, Insurance and Banking, Professionals, Audit & Risk Committee Members, Senior Management of Organizations, External Auditors
Benefit and Administration Committees	24th to 28th April	South Coast	75,000	Pension board of trustees, pension secretariat, HR and Finance professional
Pre-Retirement Seminar	17th to 21st April	Naivasha	69,500	Employees, members of pension schemes
Effective Boards and Board Tools	22nd to 26th May	South Coast	75,000	Board members, Trustees, CEOs, Public secretaries, legal professionals
Alternative Investments congress	19th to 23rd June	Mombasa	65,000	Pension board of trustees, pension secretariat, Investors, Finance professionals, Family officers
Public Sector Financial Reporting	19th to 23rd June		75,000	Accountants and Finance Officers in the County Governments, Public sector accountants, Chief Finance Officers in SAGAs, Finance Directors and Managers in entities dealing with the government, Tax Experts, Engagement Partners and Key Audit staff, SME sector accountants and Auditors
Board Induction Seminar	24th to 28th July	Nanyuki	60,000	Pension board of trustees, pension secretariat, scheme secretariat
Pension Conference	23rd to 25th August	Mombasa	65,000	Trustees, pension secretariat, HR and Finance professional
Compliance and Risk Workshop	25th to 29th September	Naivasha	69,500	Pension board of trustees, pension secretariat, HR practitioners, Finance professionals
International Pension Congress	23rd to 27th October	Mauritius	150,000	Board members, CEOs, Trustees, CFOs, HR Professionals, Pension secretariat, Scheme administrators
Financial Reporting Excellence IFRS and IPSAS	25th to 29th September	Naivasha	75,000	Accountants and Finance Officers in the County Governments, Public sector accountants, Chief Finance Officers in SAGAs, Finance Directors and Managers in entities dealing with the government, Tax Experts, Engagement Partners and Key Audit staff, SME sector accountants and Auditors
Effective Trusteeship	20th to 24th November	Kisumu	69,000	Trustees, pension secretariat, HR and Finance professional
Pension Scheme Audit, Accounting and Investment Reporting	4th to 8th December	Mombasa	75,000	Scheme trustees, Fund accountants, Secretariat team, portfolio managers
Pre-retirement Workshop	11th to 15th December	Mombasa	69,500	Members of pension schemes, Employees, company executives

OTHER TRAININGS AND CONSULTANCY AREAS

- Strategic plan development and review
- Preparation of IPS
- Board Evaluations
- Development Policies for Pension schemes;
- Trust Deeds and rules
- Member Education
- Personal Financial management
- Job separation training
- Retirement readiness the transition management training
- Wealth creation
- Corporate governance

CONSULTANCIES:

Consultancy/Advisory and Strategy

Asset manager selection, Mandate optimization, investment policy statement review, back office operation services, board evaluation services, Investment technology support, GIPS verification and firm assistance to compliance.

Investment Analytics

Asset allocation, investment evaluation, investment performance checks, Risk and performance monitoring, Historic performance analysis, Independent valuation of unlisted investments, Business modelling and risk analysis, Quarterly valuation reporting support, Fund accounting services for institutional clients, customized indices and independent mandate compliance monitoring.

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