

Boal & Co's work in the QROPS sector has shown a genuine commitment to the market and customers alike, along with demonstrable technical expertise

Innovation and experience



Boal & Co is a leading offshore firm of actuaries and pension consultants. The company, led by directors Gary Boal (BSc FFA FSAI) and Mark Kiernan (MPMD), is a member of Abelica Global.

Abelica Global is a world leader in the provision of International Finance Centre (IFC) actuarial and consulting services, with offices in key IFC locations worldwide.

Boal & Co's international pensions practice is the largest part of the firm's business, with total assets under administration/trusteeship fast approaching £500m (\$814m). The business boasts no fewer than five Fortune 500 companies, plus other leading multinationals, as valued international pension clients.

In the area of individual pensions business, Boal & Co has over 15 years' experience in providing offshore pension transfer schemes (long before 'A-day'). Today, Boal & Co's comprehensive range of QROPS solutions and support services, including both Guernsey and Isle of Man QROPS, and (unique for a QROPS provider) final salary pension Transfer Value

Analysis, is well recognised and regarded by international advisers.

Boal & Co's QROPS credentials were further proven by its pivotal role in the development of the Isle of Man's 50c legislation and the launch of Boal & Co's ground-breaking Trinity 50c scheme, the first to be established under the new 50c pensions legislation passed by the Tynwald in October 2010.

Boal & Co's initiatives have put the Isle of Man clearly ahead of other QROPS centres, with Trinity the flagship of the firm's complete QROPS range.

Recognition of what Boal & Co has achieved with Trinity/50c came in the presentation of a Special Award for Technical Innovation at the 2011 *Professional Adviser* International Fund & Product Awards.

In the QROPS area, Boal & Co points to its key strengths as:

- **Innovation** – Trinity is the first QROPS of its kind, facilitating higher retirement lump sum benefits, greater flexibility in retirement, and benefits paid without deduction of tax. To quote the 2011 judging panel, Trinity is "technically as good as it gets" and "Boal & Co displays a depth of technical knowledge that shows a clear understanding of the QROPS market".


- **Experience** – Boal & Co has been creating and administering offshore pension transfer schemes for over

15 years. Total pension schemes assets under administration by the firm exceed £400m.

- **Expertise** – The company is a trusted adviser to large international pension schemes for some of the world's leading businesses, including final salary schemes. Boal & Co supports advisers undertaking final salary transfers by its Transfer Value Analysis (TVA) service.

- **Regulation** – Boal & Co (Pensions) Ltd is regulated as a professional schemes administrator by the Isle of Man Insurance & Pensions Authority (IPA), and the benefit of those regulations extends to the firm's pension clients around the world. All Boal & Co QROPS schemes are registered with the IPA, and all are subject to full regulation under the IoM Retirement Benefits Schemes Act 2000.

- **Choice** – Boal & Co provides both Guernsey and IoM QROPS solutions. However, it rightly regards Trinity, the first scheme established under the Isle of Man's new 50c legislation, as the holy grail of QROPS schemes.

- **Reputation** – Boal & Co's reputation in the international life assurance industry adds to its QROPS proposition. Many of the firm's staff have been drawn from leading IoM life companies, and its close proximity to many offshore life companies is helpful in easing the administrative process. 

“Boal & Co's initiatives have put the Isle of Man clearly ahead of other QROPS centres, with Trinity being judged 'technically as good as it gets'”

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Awards 2011
Special Awards
For Technical Innovation in the
QROPS Sector
Winner
Special Award



Trinity

"Technically as good as it gets – Boal & Co should be congratulated"

Judges' comments, International Fund & Product Awards 2011 – Special Award for technical innovation in the QROPS sector

"Boal & Co displays a depth of technical knowledge that shows a clear understanding of the QROPS market"

"Boal & Co's work in this sector shows a genuine commitment to the market and customers alike"

Your clients deserve the best retirement solution.

Trinity – QROPS redefined.

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The Trinity Pension Scheme ("Trinity") is an Isle of Man qualifying recognised overseas pension scheme (QROPS) approved under s50C Income Tax Act 1970. Trinity is provided by Boal & Co (Pensions) Ltd, an actuarial firm registered with the Isle of Man Insurance and Pensions Authority as a professional schemes administrator. This advertisement is for professional advisers only and is not for distribution to retail clients.

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