



Company Charter

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I. MISSION

Pittet Group

Consulting

To provide expert opinion, to advise

As an independent and experienced agency, we offer our clients answers, know-how and advice in our areas of expertise. The three entities that comprise the Pittet Group have the common goal of fully addressing the specific needs of businesses, pension funds, and insurance companies.

Pittet Associates

Actuarial Appraisal

Ensure legal compliance and financial stability, appraise

As legal experts, our role is to closely monitor the legal conformity and financial stability of pension funds, both in the short- and long-term. Our activity is devoid of any conflict of interest.

Debate

Share our convictions, promote discussion

Motivated by firm beliefs, we pledge to participate in institutional debates concerning occupational benefit planning, pensions and their future, through continuous analyses, reviews and proposals.

Great Accessibility

Make the concepts of pension planning and insurance more transparent, to popularise

Our academic and technical knowledge allows us to popularise it through publications, articles, and training seminars. These are designed to simplify the terms used in our field, and make the concepts of occupational benefit planning and insurance more transparent and understandable to our clients, the public and the media.

Pittet Risk Management

Actuarial Appraisal

Ensure legal compliance and solvency, appraise

As Responsible Actuaries, we monitor the over-all management of insurance companies from a technical and quantitative perspective. This enables them to optimise their resources, maintain an adequate level of solvency, and respect the legal framework.

Risk Management

Predict and manage risk, assess

Our expertise and the specific tools at our disposal allow us to work with our clients on the qualitative process of identifying and evaluating the risks inherent to their business. By setting up internal monitoring systems, we aim to improve the management of the company.

Pittet Communication

Promotion

Develop communication strategies for pension funds, promote

As communications specialists, we are committed to assisting pension fund stakeholders produce wilful and qualitative communications tools. We believe that this is essential for maintaining trust in occupational benefit planning.

Implementation

Develop communication tools, implement

Meticulous implementation is the key to a successful communications strategy. For this reason, we work with our clients to create and execute their communications strategy. In particular, we are able to develop and implement a complete range of communications tools for our clients.

II. VISION

Lasting Performance

To build on our professional reputation

As a role model in the fields of occupational benefit planning and insurance, we pledge to maintain the superior level of our skills, the strength of our commitment, and the quality of our services, in order to perpetuate our solid reputation.

Sustainable Growth

To ensure secure and steady development

In our field, forging a lasting identity is paramount, and depends on careful and steady growth. We recognise the importance of controlled development, which allows us to increase, expand, and promote our know-how, while remaining true to our values of proximity and providing a friendly and fulfilling atmosphere for our staff.

Visibility

To build on our professionalism

Our goal is to increase our visibility in the fields of occupational benefit planning and insurance. As we strengthen our organisation, continue to ensure the quality of our services and the coherence of our structure, and develop synergies, we will consolidate our independence and assert our entrepreneurial growth.

III. PROFESSIONAL VALUES

Independence

Impartiality – Critical thinking - Integrity

Based on our independence, impartiality, and capacity for critical thinking, we are in a position to guarantee services devoid of all conflicts of interest. Our independent and truly critical spirit is not only a key aspect of our integrity, but also forms the very foundation of our identity.

Professionalism

Competence – Precision – Reliability

Our professionalism is a result of in-depth training and well-trying skills. It embraces three essential qualities: competence, precision, and reliability. We are conscious of our responsibility with regard to the financial future of pension funds, and we base our analyses on our academic knowledge, professional experience, and rigorous processes. Our professionalism ensures our credibility and inspires client confidence.

Transparency

Clarity – Synthesis– Communication

Our policies and relationships are supported by clear, synthetic and ethical analyses. Transparency is essential for ensuring credibility, and it informs each and every aspect of our actions.

Proximity

Availability – Flexibility – Sociability

We offer our clients a unique range of solutions adapted to their needs, based on careful attention to market trends, a high degree of availability, and personal contact. We consider direct contact and mutual trust essential for the development of an effective professional relationship.

Vitality

Evolution – Improvement – Efficiency

A progressive view of our field and concern for entrepreneurial efficiency encourage us to constantly update our know-how, technology and organisational structure, in order to guarantee their continued relevance, effectiveness, and development.

IV. MANAGEMENT VALUES

Autonomy

Sense of responsibility – Growth - Authority

Each staff member enjoys a great measure of autonomy, in accordance with our shared values; this builds a sense of self-reliance and individual responsibility. It is the direct result of the mutual trust established between the company and its staff. Responsible autonomy, a strategy that fosters professional development and energises our staff, constitutes the driving force of our organisation.

Versatility

Global approach – Synergy– Motivation

Our versatility has provided us with extensive experience in our field, as well as a global approach that offers constant stimulation in the wide variety of tasks that we encounter. Our versatility contributes to the cohesion of the organisation, generates synergies, and motivates our staff.

Respect

Consideration – Trust - Sincerity

In the interest of cohesion, each staff member remains attentive to the needs and concerns of his or her colleagues. Mutual respect breeds collective harmony, and is a vital part of building trust, which in turn fosters sincere and healthy collaboration.

Openness

Curiosity – Team Spirit - Conviviality

Both intellectual curiosity and the availability of staff members characterise our approach to our complex and diverse business environment, and provide a sound basis for optimal collaboration. Open communication among colleagues reinforces team spirit. Conviviality is both a source and a result of fruitful cooperation, and contributes to a positive working atmosphere where warmth, satisfaction, and authenticity can develop.

Initiative

Creativity – Adaptability – Striving for Perfection

We heartily endorse the creativity of our personnel and the development of our structure. We promote initiative among our staff as the best way to consistently improve and adapt to change.