



Comsure

CONSULTING PORTFOLIO GOVERNANCE &
REPORTING ADVISORY SERVICES

Est. 2005 • Jersey, Channel Islands

Comprehensive compliance • Risk management • Regulatory advisory

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About Comsure



Comsure was founded in 2005 to provide comprehensive business risk advisory services. We offer organisations a wealth of specialist skills and experience across compliance, risk management and regulatory advisory.

- **SPECIALIST EXPERTISE**
 - Deep regulatory knowledge across financial services, corporate governance and risk frameworks.
- **PROVEN EXPERIENCE**
 - Over 20 years delivering practical, proportionate solutions to clients in multiple jurisdictions.
- **COMMERCIAL APPROACH**
 - Tailored advice that balances regulatory requirements with your organisation's strategic goals.

Comsure Consulting — Portfolio Governance & Reporting Advisory Services



- **COMSURE CONSULTING PROVIDES**

- Independent analytical & educational support to assist private investors, trustees, and family office professionals in building their own capability to understand, evaluate, and oversee investment-related information and reporting.

- **REPORT LITERACY SUPPORT**

- We help clients develop the skills and frameworks needed to read, compare, and contextualise the performance and risk reports produced by their appointed investment managers and third-party performance monitoring services.
- Our support is focused on explaining report methodology, data presentation conventions, and common industry metrics — enabling clients to ask better, more informed questions of their service providers.

Comsure Consulting



- **GOVERNANCE FRAMEWORK AND DOCUMENTATION SUPPORT**
 - For Trusts and Family Office Groups, we help develop and document governance frameworks and investment oversight policies. This includes:
 - Support in preparing investment policy statements, defining reporting requirements.
 - establishing structured review processes — enabling boards, trustees and principals to discharge their own oversight responsibilities effectively.
- **WHAT IS CRITICAL**
 - All investment decisions remain solely with the client and their appointed regulated advisers.

Comsure Consulting



- **COMSURE CONSULTING DOES NOT**

- Manage investment portfolios, provide investment advice, make recommendations as to the purchase, sale, or retention of any investment, act as an intermediary in any investment transaction, or hold or control client assets.
- Act as a Trustee, Fund Manager, Investment Manager, or Financial Adviser and is not authorised or regulated by the Jersey Financial Services Commission for those purposes.



COMSURE CONSULTING

EXPECTED GOVERNANCE FRAMEWORK AND DOCUMENTATION SUPPORT

When helping clients, Comsure wishes to remind them of the minimum governance structure expected when overseeing investment activities.

GOVERNANCE FRAMEWORK AND DOCUMENTATION SUPPORT



◦ YOUR GOVERNANCE STRUCTURE

- **Board of Directors** — has the ultimate responsibility and accountability for the oversight of the approved investment policy, together with all investment decisions, to ensure they are in accordance with the agreed investment policy and that all fiduciary and statutory obligations are being met.
- **The Investment Committee (IC)** – to ensure that the investment decisions are in accordance with agreed investment policy. To review the investment performance and all appropriate risk factors and other considerations that may impact on either.
- **Compliance** — to ensure that all regulatory and internal policy requirements are being met and to highlight any breaches.
- **Administration** — to maintain records to facilitate accurate reporting.
- **Ongoing monitoring** — review performance against agreed benchmarks and peer groups, on a quarterly basis. Regular internal compliance reports to ensure that suitability requirements are being met.

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Important Notice

Regulatory Status of Comsure Consulting

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Not authorised or regulated by the JFSC - Comsure Consulting — Portfolio Governance & Reporting Advisory is not authorised or regulated by the Jersey Financial Services Commission (JFSC) under the Financial Services (Jersey) Law 1998, the Proceeds of Crime (Jersey) Law 1999, or any other Jersey financial services legislation. Comsure Consulting does not hold any licence, registration, or permission from the JFSC to conduct regulated financial services business.

No investment advice, portfolio management, or regulated activity - Nothing in this presentation, and nothing provided by Comsure Consulting in the course of any engagement, constitutes investment advice, a personal recommendation, or an opinion as to the suitability of any investment, investment manager, or investment strategy for any specific client. Comsure Consulting does not manage investment portfolios, arrange investment transactions, or hold or control client assets. All investment decisions remain solely with the client and their appointed regulated advisers.

Nature of the service - The services provided by Comsure Consulting are limited to independent analytical and educational support, governance documentation assistance, and report literacy support. These services are designed to build the client's own capability to understand and oversee investment-related information. They do not extend to the conduct of any activity or operation listed in Schedule 2 of the Proceeds of Crime (Jersey) Law 1999 as financial services business.

No regulatory protections apply - As Comsure Consulting is not a regulated entity, clients should be aware that the regulatory protections available to customers of JFSC-regulated firms — including access to the Jersey Financial Services Ombudsman in relation to regulated activities, and protections under Jersey's conduct of business and prudential frameworks — do not apply to services provided by Comsure Consulting. Clients requiring regulated investment management, investment advice, or related financial services should ensure those services are obtained from an appropriately authorised and regulated firm.

No liability for investment outcomes - Comsure Consulting accepts no responsibility or liability for any investment decision made by a client, trustee, or family office professional as a result of, or in connection with, any service, report, analysis, or commentary provided by Comsure Consulting. Past performance of any investment strategy or manager discussed in the course of an engagement is not a guide to future performance. The value of investments can fall as well as rise.

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Thank You

For further information or to discuss your specific requirements,
please do not hesitate to contact us.

• **Head of Consulting Portfolio Governance & Reporting
Advisory Services**

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