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# Design Services

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**A simple approach  
to great design**

How we look after your wealth

Starting with the end goal in mind

Our process allows us to be forward looking and dynamic, moving decisively to capture potential market returns.

We use diversified, multi-asset portfolios to target your individual return expectations within your specific risk tolerances. This is an approach that we have adopted since the launch of this business and we continue to believe that this is the best way to deliver real value to clients. Exceptions to this multi-asset approach are our fixed interest and equity-only portfolios which have a single asset class focus.

#### Established process

Our process allows us to be forward looking and dynamic, moving decisively to capture potential market returns. We believe that this 'go anywhere, anytime' approach can offer protection in difficult periods of positive market returns. If this results in a zero weighting in an unfavourable asset class then this is what we would do. By not having to worry about deviating from an inappropriate benchmark, we are able to focus on meeting the central objective which is to grow the real inflation-adjusted value of your investments.

Investment process to our clients and profit and we believe it to be the best approach in the UK wealth market. As well as the flexible approach to portfolio management, we have adopted a rigorous institutional approach to the management, selection and oversight.



We provide outstanding design and artworking services for the financial and professional services sectors.

A qualitative review of the results of the 2019 Financial Review is provided in the Chairman's Report. The results are set out in the Consolidated financial statements. The key indicators of performance for 2019 are set out below:

REVENUE  
(£000's)

19.0% ↑



GROSS MARGIN  
(£000's)

1.4% ↑



# Our Approach

**Our design team at Perivan strive to make the creative process as straightforward and enjoyable as possible. We deliver consistently impressive results, on time as well as on budget.**

Our designers work directly with your team to fully understand your brand and the image you wish to convey to your key customers. Whether it's smaller tweaks and changes required, or a complete brand overhaul, our team are a safe pair of hands for your project.

We have years of experience in corporate design, injecting style and displaying your key data in a way that's engaging and memorable.

We have many satisfied clients across the financial and professional services sectors and beyond who continue to place their trust in Perivan for all of their design requirements.

## **Our core design services include:**

- Brand Development
- Corporate Design
- Annual Reports
- Creative Artworking



## Brand Development

Your brand is a fundamental asset which underpins your entire business. We've worked with a wide range of businesses, crafting brand identities which make the right impact. Your visual identity can convey a whole range of different meanings, so it's crucial that your brand is making a statement which is aligned with your vision.



## Our Design Services



### Corporate Design

We work with many of our clients year on year across multiple projects, taking care of all their corporate design requirements. We offer a full range of corporate design services covering everything from brochures and flyers, through to business reports and fact sheets, corporate stationery and much more





## Annual Reports

We have many years of experience working across a large number of clients designing impactful annual reports. We're able to provide a full package, including the printing and mailing of reports, as well as design and typesetting.





### Creative Artworking

Our accuracy, speed and attention to detail means that our clients consider us a safe pair of hands for their monthly and quarterly, time sensitive reporting needs. Our team can take your material and craft a visually-stimulating document which makes the reader experience enjoyable, as well as informative.



# Giving Millennials the Responsible Investments they want

Our research focused on British millennials. In 2016 we discovered that investors are more interested in ESG products than ever before. Our research shows a growing interest in responsible investment (RI) from younger pension savers and investors – the millennials who will be saving for their retirement. This age group can be a powerful force for change in the investment industry. We expect their money to be working in the most responsible sectors and companies. The investment industry needs to understand the new normal landscape. Becoming the new normal means providing the real stream of opportunities for the industry to meet the needs of its investors. This is a great opportunity to do things that matter over the long term. We need to manage the risk of climate change, social and governance issues, and the impact of these factors on the value of investments they want.

- 1. Millennials care about RI. Over 80% of millennials not already holding RI investments were interested in doing so.
- 2. Millennials think they are more interested than others. 70% of millennials thought people their age would be more open to the idea of RI than other people are.
- 3. Everyone wants more information about RI. 61% of all respondents wanted more education about RI and the products available.
- 4. Investors will choose providers who have RI expertise. 70% of respondents took evidence of RI expertise would affect which provider they chose.
- 5. The environment is the top priority. Over a third of respondents said the environment is the top priority when choosing investments.
- 6. People don't see reducing long-term returns. In line with many recent studies, 50% of respondents said they would not see reducing long-term returns as a reason to change investments.
- 7. People will divest from controversial companies. 50% said they would take 2 to 5 controversial companies off their list to change investments.
- 8. Digital is an opportunity for RI. 65% of respondents thought that the move to digital could increase uptake of RI products.

## What these trends mean for the investment industry

Our research showed that investors, and particularly millennials, have a healthy appetite for good quality information about RI. They expect providers already to be integrating ESG factors into their reporting and decisions, and that the RI products should be transparent and genuine. Every part of the industry can play a role in the common goal of giving the investors of tomorrow what they need.

Defined Contribution schemes need to inform themselves properly on RI, and to express their policies to members. Consultants need to support trustee decisions and, following the new regulations on Statements of Investment Policies, help them to think about how RI will be a part of their default fund as well as their selected options. There's a great opportunity here, as we believe members are likely to have more when they feel good about where their savings are invested.

Investment managers need to be clear about their beliefs and approach to RI. They should show ESG outcomes of funds alongside financial performance, and explain how they are moving away from language that steers or implies their RI view. Managers need to move that RI investments don't divert from their performance – they want a balance. But they also need to understand that regulators and policy makers need to support these changes, with standards for trustee training and education. RI should promote consistent definitions for classifications and use independent measures to test the RI claims of investment managers. Policy makers should also consider whether to use tax tools to stimulate take-up of RI products.

Investment platform providers and fund selectors should provide clear information for investors on RI, where more fund managers, they need to offer more RI funds and easy ways to compare them.

Finance sector trade bodies and NGOs should be pushing for wider education on RI from financial advisers to schools to accredited programmes in investment houses. And they have an important role to play in highlighting good practice and calling out bad, including 'greenwashing'.

Initiatives such as the ICG framework (see page 35) will be helpful in satisfying the information need from millennial investors, enabling an insight into the desirable outcomes they wish their investments to achieve.

Room Briefing paper and outlook paper



# Why choose us



You don't need to worry about being charged extra. Relax in the knowledge that we work on set project costs. When we agree a price, that's it.



You can come to expect the highest quality results. We only produce work that we feel proud of and projects we're happy to put our name to.



You'll hit your deadlines. The time critical nature of some of our projects means we don't say this lightly. We will work efficiently and quickly to deliver a time critical document.



You can achieve the quality results you're after, and we're confident you'd want to work with us again in the future (many of our clients do).



Our team will feel like a natural extension of your team. And why shouldn't they? We love collaborative working and developing valued relationships with our clients.



**This was a logo refresh project that evolved into a full rebrand. The entire project was completed in a couple of months, and was the start of a successful ongoing partnership with Perivan. They just seem to 'get us'; on the rebrand, they were amazing, coming up with lots of options and getting it right first time, almost every time – which anyone who works with marketing clients will know is almost unheard of!**

**I had an idea and they made it real. Perivan made the whole process very easy – we're a good match.**

**Patsy Langridge**

Global Director, Marketing & Digital, Maxis GBN



# About Perivan

Since 1937 Perivan has been providing expert solutions to the financial and professional services sectors, and beyond. We work flexibly with your team to drive ROI across your core business functions, utilising the latest technology to get you there. Our long-standing heritage in print has evolved over the years and today, Perivan proudly offers technology-led marketing services, skilled corporate design and provides communications expertise for investor and shareholder relations.

## Our Mission

Our mission is to improve the productivity of our clients' operations. We achieve this by enabling companies to quickly deliver their communications and essential documents to their

stakeholders. With our expertise we work hard to manage projects, understand client strategy, anticipate problems, assure quality and hit deadlines – making delivery smarter, faster and safer.

# Contact Us

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