



Isio announces the appointment of three new partners.

31st January 2024: Isio, one of the UK's largest pensions, wealth and investment advisory businesses announces three new partners, demonstrating its continued investment for future growth and expansion.

Recognising the importance of investing in people, Claire Whittaker, Girish Menezes and James Keclik have been promoted to partner. All demonstrate a strong track record of helping clients and will play a pivotal role in continuing to bolster Isio's position as a market disruptor.

Claire Whittaker, Adviser of the Year at Women in Pensions 2022, and part of the Actuarial & Consulting team has been with Isio from the start; with a strong track record of helping corporate and trustee clients since 2006 across M&A and large-scale pensions projects. As partner, Claire will play an active leadership role supporting the firm's growth ambitions in London, supporting clients including advising on strategic scheme governance projects.

Girish Menezes, Head of Administration at Isio, has over twenty-five years of expertise in business strategy, proposition development, sales, and operational delivery. As Partner, Girish will continue to lead Isio's Pension Administration team, an area of rapid growth for the firm. Girish is also a Board Director of the Pensions Administration Standards Association (PASA) and a member of the Advisory Council of the Pensions Management Institute.

James Keclik, Head of Isio's Reading office, and part of the Actuarial & Consulting team, has been supporting clients at Isio since 2009 and has a strong track record and breadth of expertise in the pensions industry. As Partner, James will continue to lead the Reading team, alongside playing a wider strategic role nationally meeting clients' needs through more diverse Isio offerings.

Andrew Coles, Chief Executive of Isio commented: *"We are fortunate to have very talented people at Isio bringing great expertise and value to our clients. Since becoming independent in 2020, we have appointed 23 new partners demonstrating our commitment to investment for our growth and creating progression and opportunities for our people. Claire, Girish and James all have excellent track records of helping Isio clients and I am delighted to welcome them to the partner leadership group at such an exciting time for Isio as we cement our challenger status in the market."*

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Notes to Editors

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About Isio

Isio is a leading independent UK provider of actuarial & consulting, pensions administration, investment advisory, employee reward & benefits and wealth advisory services. With a national team of 1,000 people across ten regional hubs, Isio is committed to promoting financial wellbeing for all and works with companies, trustees and individuals to help them make informed decisions to protect their financial future.

Isio was launched in March 2020 when it acquired the pensions advisory practice of KPMG LLP with backing from Exponent Private Equity LLP. In January 2022, Isio acquired Premier Pensions Management Ltd enhancing and extending its service offering to new and existing clients. On 30 May 2023 Isio completed the acquisition of Deloitte Total Rewards & Benefits Ltd, the UK pensions advisory business of Deloitte LLP, which is now known as Isio Total Reward and Benefits, part of the Isio Group.

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