

## Investment Advisory Services

Are you looking for independent advice on how to select the best investment manager and how to develop an effective investment strategy? If so, you can benefit from our investment advisory services. Unlike other advisors, we work to ensure that both the investment strategy and corresponding policy underpins your charity's main strategy.

We will work closely with Trustees providing guidance through the maze of different investment management offerings, and help you to find the right solution from the whole investment market.

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*(Trustees) can now be more confident about compliance in the widest sense regarding our Trustees meeting their regulatory responsibilities.*

*Investment Advisory Client*

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### Benefits of advisory service

- Independent service supporting the charity rather than profiting from the results
- Service offered on a fee basis with your charity enabling competitive terms to be negotiated with fund managers
- Support for Trustees in meeting duty of care and compliance requirements
- Excess income can be invested successfully to fund future activities
- Investment plans developed alongside charity's strategy
- Development of investment monitoring to suit your requirements

### Things to look at

- When was the last time you reviewed your investment strategy, asset allocation or investment manager? If more than 3 years ago you need to ensure you are fully compliant.
- Does your charity have a robust and forward looking investment plan that will deliver a return on your investment in all market conditions?
- If appropriate, how ethical are your investments and how well do they match your objectives and should you use outside monitoring services?
- What is the best way to protect your investments from market volatility?
- What are the income requirements, how does this match the growth aims?

**Call us on 01793 554204 for further information on how we can assist.**

