

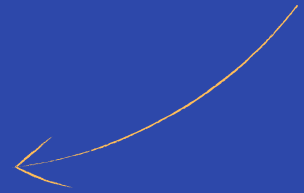


Clarity for Charities

Charity Intelligence
Newsletter
August 2021

BE IN THE KNOW WITH OUR NEW LOOK NEWSLETTER...

- Responsible Investment made easy
- Meet our new Professional Partners
- Investment Fund Performance Update
- Dates for your diary



HOW DO WE HELP CHARITIES MAKE INTELLIGENT CHOICES?

Meet **Guy & Lynn** our Co-Founders...



Charity Intelligence was established with the simple aim to help charities and not-for-profit organisations find the right professional team for investment, financial or legal support.

Let us provide the facts - **you** select the provider...

When it comes to transforming income into effective investment, we believe that charities deserve the best, so we created a unique, free resource designed to save time and money by helping you get it right first time!

For more information or an informal chat about building or reviewing your charity support services email: info@charityintelligence.co.uk

RESPONSIBLE INVESTMENT MADE EASY:

This month Smith & Williamson talks responsible investing ...

This month Smith & Williamson provide a guide to help trustees to make informed choices about how they want their charity investment portfolios managed.

Many charities have led the way in ethical and responsible investing. They were pioneers of the negative exclusionary screens to avoid exposure to certain companies and sectors as well as the wider Environmental Social and Governance revolution we are seeing today.

The aim of this guide is to help trustees to make informed choices about how they want their portfolios managed.

Read more on our website

www.charityintelligence.co.uk



NEW CHARITY INTELLIGENCE PROFESSIONAL PARTNERS ...

Welcome to the team

Aberdeen Standard Capital and Castlefield



Aberdeen Standard Capital is a discretionary manager with a specialist charities team based in London, Edinburgh, Birmingham, Bristol and Leeds currently managing £1.9bn on behalf of charities. They were recently appointed to manage the Charities Aid Foundation (CAF) investment funds.



Castlefield was founded to help charities to look after their assets. Leaders in responsible and sustainable (ESG) investing, their experienced team can guide you through the necessary steps and work with you to ensure your mission is supported for the long-term.

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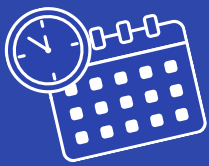
KEEPING PERFORMANCE MANAGEMENT SIMPLE ...

Comprehensive Investment Fund Reporting to save you time and money

The latest Charity Fund Report is now available on our website: www.charityintelligence.co.uk

The unique report collates data from each Investment Manager to provide you with the most comprehensive guide on all charity specific funds, including performance, costs, and generic fund information.

You can use this report to see how your charity investments are performing providing you with reassurance on financial governance.



DATES FOR YOUR DIARY!

September Charity events, updates and training

Summer holidays are in full swing and September is fast approaching! We have a range of key events planned for you to register your place by visiting our website or registering at: www.charityintelligence.co.uk/events/

Are you a Trustee with responsibility for Financial Investments?

15th September: Rathbones Considerations when selecting an investment manager

17th September: Waverton Annual Investment Forum

Are you leading a Charity and need the latest sector updates for non-profits?

14th September: FJ Philanthropy The Future of the Workplace

27th September: Beyond Profit Managing digital risk and governance

Are you up to date with your professional Development?

30th September: Smith & Williamson - London Charity Conference

Is your charity focused on Arts and Culture?

23rd September: Haysmacintyre - Arts and Culture Benchmarking Report Launch

Is your Charity interested in Property Investment?

30th September: PITCH Mayfair Capital Charity Investment Seminar