

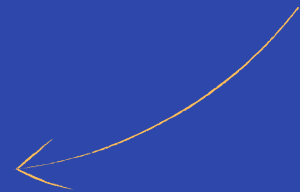


Clarity for Charities

Charity Intelligence
Newsletter
November 2021

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

- **Spotlight on Charles Stanley**
- **Meet our new Professional Partners**
- **Investment Fund Performance Update**
- **Dates for your diary**



WELCOME FROM OUR CO-FOUNDERS, GUY AND LYNN

Helping charities find the **right** expert advice



We established Charity Intelligence with a simple aim: to help charities and not-for-profit organisations access the right professional investment, financial or legal support.

When it comes to transforming income into effective investment, we believe charities deserve the best. So we created the Charity Intelligence Hub, our unique, free platform to help you quickly and easily find the advice you need first time.

We provide a tailored database of advisers, based on your requirements, and you choose the expert that's right for you.

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

INVESTMENT IRRESPECTIVE OF SIZE...

This month: Spotlight on

Charles Stanley's belief is that every charity, foundation and not-for-profit should have access to high quality investment management services.

For charity assets from £10,000 to £300,000, Charles Stanley's Personal Portfolio Service offers five professionally constructed and actively managed portfolios designed to help you achieve your charity's specific investment objectives within a defined level of risk – from the most cautious to the more adventurous.

CHARLES STANLEY

Wealth Managers

Find out more and read the article on full on our website [HERE](#)

*Read more articles and guides in our Insights library on our website [here](#).

WELCOME TO OUR NEW PROFESSIONAL PARTNERS

Meet the latest specialists to join
our growing database of charity professionals



Your Treasurer provides specialist treasury risk management services, including counterparty bank due-diligence, to help clients comply with their governance and regulatory requirements.



Keylu is a secure online platform which allows users to store personal, legal and financial information for today and the future, and makes it available to the right people at the right time. The platform supports charities looking to grow or develop their legacy gifting and 'gifts in wills' proposition, as well as adding value to the lives of supporters.



JG Creative is a design and brand agency, working across web, print and signage throughout the UK. They specialise in the not-for-profit sector and are passionate about helping charities, trade bodies and public sector organisations communicate well.

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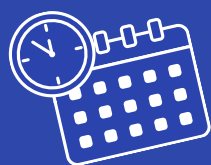
KEEPING PERFORMANCE MANAGEMENT SIMPLE ...

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!

November Charity events, updates and training

It's Trustees' Week (November 1st to 5th), showcasing the great work of trustees and charities. Our partners are also continuing to provide support with a wide range of events throughout November. Find out more and register on the Events page of our website [HERE](#)

Are you a Trustee with responsibility for Financial Investments?

14th November CCLA Birmingham Investment Seminar

11th November Cazenove Charity Multi-Asset Fund Update

Are you up to date with your professional development?

10th November Charity Chats with Oomph Learning & Development

16th November Sarasin Advanced Trustee Training

Is your charity focused on climate change?

9th November CCLA Investing for net zero with the Clean Growth Fund

Does your Charity use overseas suppliers?

17th November Crowe Brexit: Buying goods from overseas suppliers