

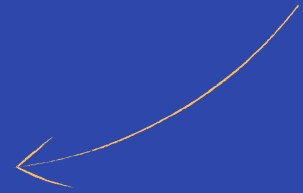


Clarity for Charities

Charity Intelligence
Newsletter
February 2022

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

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



WELCOME FROM OUR CO-FOUNDERS, GUY DAVIES AND LYNN PATES

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

IT'S TIME TO GET REAL

Many of us are interested in changing things for the better, with charities particularly focused on the practicalities of driving fair social and economic progress.

From climate change to growing levels of poor mental health, our economy is far from sustainable. If this imbalance continues, social and environmental factors will come back to bite the value of investment assets as well as negatively impacting our living standards.

Despite the ever-growing attention on environmental, social and governance (ESG) factors, we do not feel that the investment management industry has truly understood that the only way to manage these risks is to go beyond the make-up of our portfolios and make a lasting real-world impact.

It's time to 'get real' about ESG.

This month: Spotlight on



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.

WELCOME TO OUR NEW PROFESSIONAL PARTNERS

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



Charity Excellence provides free online checklists, resources and a funding finder database.

Zurich provides insurance for charities, social enterprises and community groups of all shapes and sizes, including public liability, event, trustee indemnity and vehicle cover.

Charity Digital helps other charities accelerate their missions using digital technology.

PMCL Consulting provides independent regulated investment consultancy, specialising in advising charities and not for profit organisations.

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!

Charity events, updates and training

Our partners are continuing to provide support with a wide range of events throughout February for charity trustees, senior leaders and consultants. Find out more and register on the Events page of our website here.

Are you responsible for finances?

1.2.22 Crowe: Partial exemption for charities webinar

4.2.22 Sayer Vincent: Preparing for your audit

9.2.22 Charity Digital: Workshop 1 - A practical guide to effective budgeting

11.2.22 Sayer Vincent: Gift Aid

23.2.22 Charity Digital: Workshop 2 - Futureproofing and financial

Are you up to date with your professional development?

16.2.22 Crowe/Rathbones: Firefighting to flourishing: Returning to a new normal

18.2.22 Sayer Vincent: Building a resilient charity

Does your charity have employees?

9.2.22 Buzzacotts: Digital and cyber security for membership organisations

25.2.22 Sayer Vincent: Employment tax

Does your charity have property assets?

9.2.22 RSM: Maximising property potential and protecting property assets webinar.

Register or log in to Charity Intelligence and access your free database of charity advisers matched to your needs. Find out more [here](#).