

Investing for good
Charitable Investing
– Helping you help others

June 2023



Our focus on your charitable cause

At Broadstone, we have high quality specialists that provide a full spectrum of investment advice to pension schemes, employers, charities and non profit organisations.

When it comes to charities, endowment funds and non profit organisations we recognise the immense pressures that face the sector in general, but importantly every charity is unique and the need to balance competing objectives to grow existing assets whilst meeting funding and cashflow requirements is an issue that requires thoughtful and tailored advice. It also goes without saying that value for money is critically important, as every pound saved or gained can make a real difference to front line causes.

Our team of around 30 investment specialists offer tailored and expert advice to help charities and endowment funds deliver their objectives.



I want to help. I'm driven by a deep passion to help a sector that is working so hard to do good. Ensuring that our clients have clear objectives and a mission aligned investment strategy that reflects their specific beliefs and preferences is at the heart of our approach.

Rachel Titchen

– Charities and Investment Director

Our Approach

Inclusivity

We want to make sure charities of all sizes have access to high quality advice and support. We want to work with you no matter what your size or goals.



An extension of your team

Whether it be working with the Investment Committee, finance team or other members of your team, we are flexible in our approach and we encourage clear communication to ensure all stakeholders are aligned. We also believe that targeted training in all things related to investments will provide our clients with the tools and resources to make more informed decisions.



Mission aligned investments

We will work with you and your Investment Managers to understand and identify where and how much of your investments are being used to help causes, people or communities that you care about.



We are here to help

As a trusted adviser to organisations and their pension schemes that operate in the charity sector, we have already demonstrated a passion and skill for helping those investing for good. In our view, providing the right Investment Advice and Investment Education to investors in this sector is critically important for our society and for future proofing charitable causes.

How we can work with you:

- **Strategic advice** – we ensure our advice is holistic and addresses the strategy from all angles. We will work with you to help identify and adjust your objectives so that they are right for now and for the causes that will benefit in the future.
- **Independent and tailored investment advice** – Our advice is tailored to you and our independence means we approach each case as a unique set of circumstances. We will ensure our advice is in line with your beliefs and preferences. This means the solution we find could be carefully selected pooled funds or a fully bespoke investment approach.

- **Focusing on your missions** – a thorough understanding of your objectives and missions will help us to add value to your investment arrangements. When we understand your priorities, we can focus on those. This could be, for example, ensuring your strategy reflects your ESG policies or understanding income options to meet your cashflow needs.
- **Joining the dots** – we want you to feel like we are an extended part of your team. We are flexible in our approach, and will be on hand to work collaboratively with you on anything from explaining the mechanics of asset transitions to supporting with governance requirements.



Our process

We recognise that every client is different, and we would begin our relationship by discussing what is important to you. Only when we have this deeper understanding can we be in the best position to provide you with our considered views and identify where we can help you add value.

Therefore, whether you need guidance on what questions to ask your managers, assistance with overseeing changes to your investments, or help reviewing and setting your ESG beliefs and policies, we are confident that we are well placed to be your trusted partner.

- **Investment Health Check** – Following our initial discussions with you, we would typically suggest carrying out an Investment Health Check. This helps to identify any potential areas of priority to focus on – whether that be ESG and mission alignment goals, strategic objectives or costs. Importantly, we can also assess whether your current investment strategy is consistent with your objectives and beliefs, and identify where we believe that there may be opportunities to make improvements or enhancements.

- **Who is involved?** – We believe bringing everyone into the conversation is really important, whether this be members of the Investment Committee or your wider staff. Based on our experience, effective decision making and the ultimate success of the investment strategy is much more likely when all the key stakeholders collaborate and have clear information to make decisions. We therefore advocate an open and flexible working relationship.
- **Financial Pressure** – Charities often need a link between their Finance Team and Investment Team to help ensure cashflow and liquidity needs are met. We can help and work alongside your Finance Team and Asset Manager to make sure short-term liquidity is managed through a suitable cashflow plan.



Broadstone – who are we and why should you consider working with us?

We are independent investment consultants providing advice, bespoke services and solutions to our clients.

At the heart of our business is a dedicated team of experts offering practical, meaningful and cost-effective, sustainable solutions for our clients.

Our primary objective is to fully understand and then consistently meet our clients' needs. We place a great deal of emphasis on working with our clients to build long term, successful partnerships and pride ourselves on building long-lasting, mutually beneficial relationships with organisations that value working together.

We are always looking for better, more efficient ways of doing things.

Empowering people's prosperity

Our business is built on delivering a high quality service, through referrals and doing a repeatedly good job, for our clients.





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Find out more



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