



Buzzacott Trustee Investment Services

For Trustees who are concerned that their financial investments have become too complex, are no longer appropriate, or simply that they are being over-charged – Buzzacott's Financial Planning team offers a reassuring alternative.

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TRUSTEE INVESTMENT SERVICE

Our service is focused on providing objective and independent support to help Trustees to make informed, effective and timely decisions regarding their financial investments. We are ever mindful of the increasing level of responsibilities that Trustees have and your need for support, particularly in relation to your responsibilities when overseeing charity or trust funds.

Investment Consulting Service

Given the uncertain global economic outlook, it is more important than ever to ensure that Trustees' obligations under duty of care are met, particularly when monitoring investments and performance. Our Investment Consulting Service is typically split into three stages, outlined below.

1. Investment Strategy

We will begin by reviewing any existing investment that is already in place, to gain a comprehensive picture of the assets and truly understand any exposure to risk. If needed, we can help to make any required changes to the investment policy statement so that it is in line with the charity's or trust's overall strategy and ensure that any new mandates meet the objectives set.

2. Procurement of Investment Management Services

In situations where a new or replacement investment manager is needed, we help Trustees appoint the most suitable candidate(s). Our experienced team carries out an extensive search for managers who fit your needs and the mandate. Meetings will be arranged with those that most fit the bill to help you make the right decision. We will also undertake fee negotiations on your behalf – all to ensure the right candidate for you is appointed.

3. Performance Monitoring

Once an investment mandate has been agreed and the right manager(s) employed, we continue to monitor progress. Our team undertakes regular performance monitoring of

the portfolio, reporting back frequently as well as attending regular meetings with the investment manager to help you analyse the results and benchmark it against the risk taken and return achieved. Our regular in-depth monitoring process provides Trustees with a comprehensive assessment of whether your chosen investment manager is delivering what is expected of them, allowing us to highlight any issues.

Cash Management Service

The management of liquid assets requires an equal focus on interest rates and risk. The selection criteria, process and providers that are suitable for a trust's liquid assets are very different to those used for a charity or trust's longer-term portfolio.

We evaluate many different factors when determining the suitability of a particular counterparty as a home for client deposits. These include market capitalisation, its financial strength (as measured by the main ratings agencies) and the credit risks as implied by the market (the cost of insuring an institution's debt). We can help Trustees identify whether a more competitive rate of interest can be achieved on cash within an acceptable level of risk.

Buzzacott, Trustees and Charities

Our Financial Planning team has catered for Trustees for many years, developing a deep understanding of the charity sector, and the challenges it faces.

Our clients not only benefit from the expertise of our Financial Planning team but are also able to draw on the knowledge and know-how of the wider firm, in particular our dedicated Charity & Not-for-Profit team.

Whatever you may require, you will discover a strong chemistry with the Buzzacott Financial Planning team, which has solid experience across the spectrum of trustee requirements and provides empathy, talent, and the continuity clients both need and deserve.

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Get in touch:

If you require any further information regarding our Trustee Investment services, please get in touch with our Financial Planning team

Telephone 020 7556 1200 Email BuzzacottFinancialPlanning@buzzacott.co.uk

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This document is prepared to keep readers abreast of current developments, but is not intended to be a comprehensive statement of law or current practice. Professional advice should be taken in light of your personal circumstances before any action is taken or refrained from. No liability is accepted for the opinions it contains, or for any errors or omissions.

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