

A UNIQUE UNDERSTANDING OF THE BEST WAY FORWARD

Introducing Church House Investment Management

Specialist Investment Management

At Church House Investment Management, our goal is to deliver the returns Trustees expect without the shocks they fear. We achieve this following a proven and robust approach to risk management and investing, that focuses on avoiding the permanent loss of capital.

As experienced portfolio and fund managers we have the flexibility to offer bespoke solutions that address the individual needs of our Charity clients.

Rigorous Risk Management

Meeting Trustees' expectations is the result of skill, experience and rigorous adherence to a process which has been refined over many years. Benchmarking is made to a clear risk scale rather than to some arbitrary index. The risk scale specifies parameters of expected volatility or, in plain terms, the potential for losses. Our track record going back to 1999 helps illustrate a wide spectrum of differing market conditions. These provide ample evidence of the efficacy of our approach, which we believe Trustees find comforting.

To ensure the integrity of the process, there are a series of risk controls; daily monitoring is further overseen by a monthly Investment Committee, which includes independent representation.



Successful
investment is about
managing risk not
avoiding it.

Benjamin Graham

“ *The board of Style for Soldiers can sleep well knowing that the charity’s funds are professionally managed and in the best possible hands.* ”

A Partnership Approach to Service

We combine our investment expertise with a commitment to service and close engagement with our Charity clients. With a dedicated Relationship Manager supported by a small and experienced Client Services team, Charity Trustees receive a high level of service, advice and support.

In addition to the important regular reviews to ensure results are in line with expectations and tolerance for risk, the Charities team run seminars and ad hoc meetings for Trustees to gain a wider knowledge of investment issues relevant to their fiduciary obligations.



Flexible Solutions

A key differentiator of our proposition is the deployment of our own range of investment funds to meet the specific income and growth needs of our clients. This brings a number of distinct benefits:

- Increased control over risk
- High level of transparency over where money is invested
- Consistency of investment process
- Specifically designed for diversified portfolios

For more information please visit www.ch-investments.co.uk/solutions/charities-and-trustees or to speak to one of our Charities team contact us **020 7534 9870**.

At Church House Investment Management, we only make recommendations from our range of investment portfolio services and associated accounts. Full details of the nature of our services can be found at www.ch-investments.co.uk/important-information or can be provided on request. Please note the value of investments and the income you could get from them may fall as well as rise and there is no certainty that you will get back the amount of your original investment. You should also be aware that past performance may not be a reliable guide to future performance. Church House Investment Management is a trading name of Church House Investments Limited, which is authorised and regulated by the Financial Conduct Authority.