HYMANS ROBERTSON

Charity investing with impact

Making regulatory guidance work for you

Investment training seminar: 14 May 2024 (London)

Join us on 14 May in central London for an interactive training afternoon. Aimed at charitable trustees and decision-makers, the day will equip you with all the information you need to understand the investment approaches available and be on top of recent regulatory guidance. What's more, our investment consultants and charities experts will cover the latest trends in responsible and impact investing as well as the practicalities of setting an investment strategy and measuring its success.

The sessions will be interactive. Our aim is for attendees to have an engaging afternoon and leave feeling more comfortable with trustees' investment responsibilities.

On the day

We'll cover the investment responsibilities of charities and expectations of regulators. Recent developments, including of the Butler-Sloss case, will form part of the session. Aligning with regulatory guidance and key Charity Commission guidance notes are featured, including Investing charity money: guidance for trustees (CC14).

We'll look at Responsible Investment (RI) techniques and regulatory guidance. RI investments have developed considerably in recent years, with further innovation underway. We will cover the latest impact and ethical approaches and examine new offerings in the broad ESG, climate change and biodiversity sub-sectors.

We cover the investment classes mentioned in CC14. We also address fund manager monitoring and oversight expectations, adding colour based on our own experience of evaluating performance. We cover OCIO (Outsourced Chief Investment Officer) evaluation in this section. We conclude with practical advice to help holding all investment managers to account.

Portfolio risk metrics and expected investment return evaluation are covered explicitly within CC14. We set out the most effective practices in this area, including analysis of the income and capital risks associated with popular combinations of investments. Our session includes an interactive element to reinforce the investment principles covered.

We're offering this training free of charge. A CPD certificate will be provided.

Register

alternatively, email matt.woodman@hymans.co.uk

Places are limited, though we will run more sessions later in the year.

Where

HYMANS ROBERTSON

One London Wall
London EC2Y 5EA

When

TUESDAY, 14 MAY 2024
2:00PM TO 5.30PM

We'd love to chat with you after the session – refreshments will be provided.

Time	Agenda item
2:00 to 2:15	Arrival and coffee
2:15 to 2:30	**Session 1:** Introduction and outline of the training seminar
2:30 to 2:55	**Session 2:** Charity investment responsibilities and expectations of regulators
2:55 to 3:05	Short break (10 mins)
3:05 to 3:50	**Session 3:** Investment strategy approaches and practicalities
3:50 to 4:35	**Session 4:** Ethical, responsible and impact investing
4:35 to 4:45	Short break (10 mins)
4:45 to 5:15	**Session 5:** Provider review and benchmarking
5:15 to 5:30	**Session 6:** An overview of good practice and bringing things together
5:30 to 6:30	Refreshments and close (60 mins)

About Hymans Robertson

We're an independent partnership helping to build better financial futures for millions of people across the UK. With over a century of history, we provide services to organisations and individuals across pensions, investments and insurance. Together, building better futures is our purpose.

Our decision to offer advisory services to charities reflects our own values as an organisation. For example, we set up and support the Hymans Robertson Foundation as we want to make a difference to the lives of young people and communities. Every year, the Foundation receives 2% of our profits and provides targeted support via our eight charity partners. In the six months to March 2023, we supported nearly 900 young people across the UK with over £120,000 of bursary and grant funding.

We are also proud to have obtained B Corp certification, meaning that our organisation is part of a global community of businesses certified to meet high standards of social and environmental performance, transparency and accountability. We are committed to the charity and endowment sector, and have the experience and expertise to help you.

Presenters

Matt Woodman
Head of Charities Investment Advice

Richard Lunt
Senior Investment Consultant & Investment Strategy Specialist

Sanjay Joshi
Responsible Investment Consultant

Jennifer Aitken
Investment Analyst & Charity Team Member

London | Birmingham | Glasgow | Edinburgh

T 020 7082 6000 | www.hymans.co.uk