CHARITY INVESTING & ACTIVE STEWARDSHIP

Our charity team understands the unique responsibilities, challenges and pressures facing charities and trustees. We have experience of being on your side of the table and making sure resources are used effectively to achieve the particular purpose for which they were given.

So why choose Brighton Capital Management as your partner:

DIRECT LOCAL RELATIONSHIP

All charity clients deal directly with their portfolio manager, trust and transparency is at the heart of that relationship. Being local allows us to regularly attend trustees' meetings even if outside normal working hours. We do not have any grand plans to manage thousands, or even hundreds, of charities. We want to keep to what we know best and that is increasingly working closely alongside local trustees, who typically have busy lives and appreciate the value of professional financial advice and guidance. Simply put we aim to provide very special treatment to a select number of charities.

STRATEGIC ADVICE

The financial wellbeing of the charity is continually reviewed and ensures the best bespoke solution; we provide the trustees with support for risk profiling, linking policies (risks, reserves, investments), withdrawal/spending analysis, review/creation of the 'Statement of Investment Principles' and assisting new charity investors – the transition from cash.

BESPOKE

Discretionary investment management is our core business. We offer direct investment or best of breed pooled funds via an actively managed portfolio to seek the best possible returns within the risk framework that has been agreed with each charity client.

RESPONSIBLE INVESTING

Charities are increasingly aware of responsible investing, whether a simple ethical policy to avoid tobacco and armaments, or further to integrate 'Environmental, Social and Governance (ESG)' factors, which we can incorporate into our research and investment decisions across asset classes.

REPORTING

In addition to the formal quarterly valuation reports and year-end tax packs we provide online access to portfolio valuations and cash transaction history. In addition, monthly email updates or more timely summary reports can be requested prior to trustees' meetings. We also offer clearly defined benchmark(s) to measure your specific requirements.

WE'D LOVE TO HEAR YOUR STORY

Please contact David Pegler on 01273 761 221 or david@brightoncapital.co.uk for more information

BRIGHTON CAPITAL MANAGEMENT