## ASSOCIATIONS

### ACEVO

150 Fenchurch St
London EC3M 6BB

T: 020 7014 4600
E: info@acevo.org.uk
W: www.acevo.org.uk

The Association of Chief Executives of Voluntary Organisations (ACEVO) supports members by providing access to:

- Third sector leadership and governance resources to support boards and senior management teams
- Information, publications and reports on key third sector issues
- Conferences, courses and networking opportunities to enhance skills and build knowledge
- Dedicated helplines and support services such as CEO in Crisis - a service for third sector CEOs facing disputes with their board.

ACEVO also works hard to ensure its members' voice is heard by opinion formers and influencers at the highest level.

### Charity Finance Group

15-18 White Lion Street
London
N1 9PG

T: 0845 345 3192
F: 0845 345 3193

Company Registration No. 3182826
Charity Registration No. 1054914

Charity Finance Group (CFG) is the charity that champions best practice in finance management in the charity and voluntary sector. Our vision is of a financially confident, dynamic and trustworthy charity sector. With this aim in sight, CFG delivers services to its charity members and the sector at large which enable those with financial responsibility to develop and adopt best practice.

With more than 1,300 member charities, managing over £19.3 billion, we are uniquely placed to challenge regulation which threatens the effective use of charity funds, drive efficiency and help charities to make the most out of their money.

For more information please visit [www.cfg.org.uk](http://www.cfg.org.uk).

## BANKING

### Charity Bank Limited

Fosse House, 182 High Street,
Tonbridge, Kent, TN9 1BE

Call our lending team:
T: 01732 441919
E: loanenquiries@charitybank.org
W: charitybank.org

If you could borrow from a bank run for and owned by charities and social purpose organisations, would you be interested?

Every single one of our shareholders is either a charitable trust, foundation, or social purpose organisation: our mission is to support your mission.

You can apply for loans from £50,000 to £3.25 million and more in partnership with other lenders.

We offer loans to support your organisation, a deep interest in what you do and a team of regional managers that is there to be your partner in doing good.

Talk to our lending team to enquire about a loan.

### Triodos Bank

Deanery Road
Bristol BS1 5AS

T: + 44 (0)800 328 2181
E: contact@triodos.co.uk
W: www.triodos.co.uk

Triodos Bank offers a fresh approach to banking. Our mission is to make money work for positive social, environmental and cultural change.

We do this by only lending money to businesses and projects which benefit people and the planet, including charities and community groups.

This means our depositors know their money is used to make a positive impact, while still receiving a fair return. And the charities we lend to receive informed advice, based on our team’s in-depth understanding of how to balance financial and ethical business objectives.

We offer a range of services for organisations of all sizes, including:
- Term loans and overdrafts
- Deposit and current accounts
- Corporate finance (capital raising)

Visit triodos.co.uk to find out more.

### Unity Trust Bank plc

Nine Brindleyplace
Birmingham
B1 2HB

T: 0345 140 1000
E: us@unity.co.uk

Looking for a bank that understands your charity?

Unity Trust Bank was rated No.1 for Sector Knowledge in an independent charity banking survey (2014) and was also rated top for Relationship Managers, Fees and Charges and Meeting Expectations.

Currently, around 7,000 charities bank with Unity and over 50% of our lending last year was to charitable organisations.

Established in 1984, positive social impact and financial sustainability were part of our founding principles. Today, more than 30 years later, they remain core to what we stand for.

If you’re a charity, look no further – we’re on the same page.
FUNDING

PayPal Giving Fund
Whitaker House,
Whitaker Ave,
Richmond, Surrey
TW9 1EH, UK
W: paypalgivingfund.org.uk

PayPal Giving Fund is a registered charity (No. 1110538) that raises millions of pounds each year to benefit UK charities. We enable people to give through programmes operated by PayPal, eBay, Humble Bundle and other leading internet businesses. PayPal Giving Fund receives funds donated through these platforms and seeks to grant them to charities recommended by donors.

Contact us at: info@paypalgivingfund.org

INSURANCE

Unity Insurance Services
Suite 8 The Quadrant
60 Marlborough Road
Lancing Business Park
Lancing, West Sussex
BN15 8UW
T: 0345 040 7702
F: 0345 040 7705
E: info@unityinsuranceservices.co.uk
W: www.unityinsuranceservices.co.uk/charity-insurance

Insurance for charities with 100% of our profits returned to charity.

As a charity owned insurance broker, Unity Insurance Services has a unique insight into your sector. For over 80 years, we have been protecting the people, property, liabilities and activities of charities.

We view each charity as unique so we always aim to provide solutions that fit your exacting needs. That’s why we will spend the time to understand in detail your activities and risks to obtain the best possible cover at the best possible price.

Visit our website or telephone to us to find out more.

INVESTMENT MANAGEMENT

Charles Stanley & Co. Limited
55 Bishopsgate London EC2N 3AS
Nic Muston - Director of Private Clients & Charities
E: nicholas.muston@charles-stanley.co.uk
T: 020 7149 6610
Robert Winterton - Business Development Executive - Charities, Intermediary Sales
E: robert.winterton@charles-stanley.co.uk
T: 020 7149 6265
www.charles-stanley.co.uk

A personal service shaped around you

• We currently manage £24.9bn* across a broad range of clients
• Of which our Charity team manage £1.56bn* on behalf of over 800 charities
• We provide a bespoke solution for each client, as well as a direct relationship with a dedicated fund manager
• We use a distinctive investment approach within a robust risk framework as well as offering environmental, social and governance screening
• We work closely with our clients supporting them by providing both policy guidance and trustee training
• With our 20 regional offices we are close by to support your needs

*as at 31/12/17

Investment involves risk, investors may not get back what they originally invested.

Charles Stanley & Co. limited is authorised and regulated by the Financial Conduct Authority.

EdenTree Investment Management Ltd
24 Monument Street
London
EC3R 8AJ
Philip Baker
Head of Institutional Business Development
T: 0800 032 3778
E: charities@edentreeim.com
W: edentreeim.com

Profit with principles

That is what we aim to deliver. We believe that a company's business activity, its environmental and community impact and the way it interacts with its stakeholders can all positively contribute to returns. This is why these factors are integral to our responsible investment process and why EdenTree Investment Management has won numerous awards for its performance.

Call us to discuss how investing responsibly will benefit your charity, learn how our charitable ownership helps us see things from your perspective and how your investment can make a real difference.

EdenTree Investment Management Ltd is authorised and regulated by the Financial Conduct Authority.

Epworth Investment Management Limited
9 Bonhill Street, London
EC2A 4PE
Mark O'Connor
Head of Business Development
T: 020 7496 3639
E: mark.oconnor@epworthinvestment.co.uk

Christian Ethical Investment – for Churches and Charities

We are dedicated to serving the needs of Churches and Charities, currently managing around £1.4bn.

What makes us different is how we do it. Our Christian ethical approach looks to identify sustainable companies with attractive return prospects. We then engage to positively influence their behaviour and ensure they are acting in a responsible way.

For good returns that faithfully meet your ethical requirements, please get in touch.

Epworth Investment Management Limited ("Epworth") is authorised and regulated by the Financial Conduct Authority (Registered number 175451). Data as at 31/12/19.
Suppliers Directory

To advertise in Suppliers Directory contact Linda Libetta +44 (0)20 7562 2431

INVESTMENT MANAGEMENT

M&G Investments, M&G Charities Department
PO Box 9038, Chelmsford CM99 2XF
T: Richard Macey 020 7548 3731 or James Potter 020 7548 3882
E: charities@mandg.co.uk
W: www.mandg.co.uk/charities

With M&G, you’re free to choose from two specialist pooled funds for charities, Charifund and Charibond, or alternatively, invest across our wide range of OEIC funds.

We’ve been managing charitable funds for over 55 years and now look after £1.4 billion* for charities – making us one of the largest and most experienced managers of these funds in the UK. The value of investments will fluctuate, which will cause fund prices to fall as well as rise and you may not get back the original amount you invested.

*As at 31.03.2016. Issued by M&G Securities Limited who is the fund manager and registered in England No. 90776. The registered office is Laurence Pountney Hill, London EC4R 0HH. M&G Securities Limited is authorised and regulated by the Financial Conduct Authority. Charibond’s charity registered number is 271815, and Charifund’s charity registered number is 249958.

Newton Investment Management
Alan Goodwin
Newton Investment Management
BNY Mellon Centre
160 Queen Victoria Street
London
EC4V 4LA
T: +44 (0)20 7163 4404
E: alan.goodwin@newtonim.com
W: www.newtonim.com

At Newton, our sole focus is investment management. We currently manage £43 billion for a broad range of clients, of which £3.7 billion is on behalf of charities (as at 31 March 2020).

We are a committed and trusted-long-term partner to charities, with a track record of helping them achieve their goals. But we do not stand still: innovation and thought leadership in the charity sector are fundamental parts of our business. We use a distinctive, global thematic investment approach, combined with rigorous analysis of environmental, social and governance issues, in our specially designed charity pooled funds, sustainable strategies, and segregated portfolio services.

www.newtonim.com/charities

Quilter Cheviot
Contact: Charles Mesquita
One Kingsway
London
WC2B 6AN
T: +44 (0)20 7150 4000
E: charities@quiltercheviot.com
W: quiltercheviot.com

How do you navigate investment challenges & opportunities?

• Over £1.7 billion of charity assets under management (as at 30/06/2017)

When it comes to investment, we help charities by thinking beyond the obvious.

• Support for the sector: charity seminars, bespoke investment training, ethical investment expertise and knowledge guides

Quilter Cheviot Limited is authorised and registered by the Financial Conduct Authority

Rathbone Investment Management
8 Finsbury Circus, London EC2M 7AZ
For further information please contact Natalie Yapp:
E: natalie.yapp@rathbones.com
T: 020 7399 0128
W: rathbones.com/

Rathbone Investment Management Limited is authorised is authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority

Rathbones welcomes charities of all shapes and sizes. We like to work in partnership with our charity clients which means you will have direct access to the person managing your charity’s investments, resulting in a portfolio that accurately meets your needs and is as individual as your charity. Key facts

• £6 billion of charitable funds under management
• Over 1,900 charities
• Segregated or pooled investment
• Dedicated team of charity investment specialists
• A history grounded in philanthropy

All figures as at 31 December 2019

Ruffer LLP
80 Victoria Street
London
SW1E 5JL
For more information contact: Christopher Queree, Investment Director – Head of Charities
T: +44 (0)20 7963 8110
F: +44 (0)20 7963 8175
E: cqueree@ruffer.co.uk

At Ruffer, we have a distinctive approach to investing which we believe is well suited to the needs and goals of charities and their trustees. We focus on delivering ‘all-weather’ investment returns, protecting and growing the value of our clients’ assets throughout the market cycle.

Our responsible investment fund for charities, the Charity Assets Trust, follows this all-weather approach. Its responsible investment policy includes ethical screening; restricting investment in alcohol, armaments, gambling, pornography, tobacco, oil sands and thermal coal. It also follows a proactive approach; monitoring, engaging and voting on the companies we hold in the fund against a number of different considerations including the UN Global Compact and carbon intensity.

Ruffer Group manages £20 billion to include approximately £2 billion for charities.

Ruffer LLP and Ruffer AFM Limited are authorised and regulated by the Financial Conduct Authority.

Please note that the Charity Assets Trust is an unregulated collective investment scheme (UCIS) available only to eligible charities.
Sarasin & Partners manages approximately 433 charities* with over £6.6 billion in charitable funds*, representing over 48% of the firm's total Assets under Management. We also manage investments for UK private clients, pension funds, and other institutions with total funds under management of £13.9 billion* (*as at 30.06.2019).
Our particular expertise is determining and reviewing the appropriate mix of asset classes suitable to meet the circumstances of each charity.
We are well known for our commitment to education having trained over 5,000 trustees. The reference for this training is our Compendium of Investment.
Sarasin & Partners LLP is a limited liability partnership incorporated in England and Wales with registered number OC329859 and is authorised and regulated by the Financial Conduct Authority.

Smith & Williamson is an independently-owned financial and professional services group, with 1700 people across 12 principal offices in the UK and Ireland. We are a leading provider of discretionary investment management services to private clients, charities and corporates and have around £20.4bn of assets under management and advice (as at 31 December 2017).

Smith & Williamson LLP is regulated by the Institute of Chartered Accountants in England and Wales and is authorised by the Prudential Regulation Authority and limited regulation by the Prudential Regulation Authority. Details about the extent of our regulation by the Prudential Regulation Authority are available from us on request.

Waverton Investment Management Limited is authorised and regulated by the Financial Conduct Authority. The value of investments can fall as well as rise and you may get back less than originally invested.

Charities, universities and other not-for-profit institutions have valued the personalised service and high quality investment solutions that Waverton has delivered since its inception in 1986. We understand the complex matters that charities and institutions face. That is why we would work in partnership with you, to ensure that your investments are aligned with your organisation's objectives and aims.

Waverton offers:
- A dedicated charity team
- An open and personalised service
- Pooled or segregated solutions
- Ethical investing and bespoke screens
- Institutional investment approach
- Trustee training and guidance

Waverton Investment Management Limited is authorised and regulated by the Financial Conduct Authority. The value of investments can fall as well as rise and you may get back less than originally invested.

4imprint make ordering printed products quick and simple! And what's more we back up our magnificent product range with our water-tight 'no quibble' guarantees!
It's simple. We guarantee you'll be 100% satisfied with your order, you won't find a lower price elsewhere and that if your event is missed because we don't dispatch in time then it'll be FREE!
We're here to guide you every step of the way! Ordering online is simple and secure; but if online isn't your thing, please drop us an email sales@4imprint.co.uk or call us on 0800 055 6196 and we'll get right back to you with the information you need.