

Charity Investment Services



At a Glance

- ▶ We are a specialist team, focused on the needs of charities and not for profit organisations
- ▶ We provide portfolios to meet a range of Charity income, growth and absolute return requirements
- ▶ All Charity portfolios are actively managed under the direction of the Chief Investment Officer office
- ▶ Ethical overlays can be incorporated
- ▶ We provide regular reports and attend meetings to meet your needs

Overview

We are an experienced team which exclusively deals with charities and not for profit organisations. We are entirely focused on their specific investment needs.

We offer a range of solutions for charity and not for profit organisations, including our Charity Portfolio Management Service, for example, covering Fixed Income and Equity Focused Services.

Transparency and clarity are key to our goal of building successful long-term relationships and we are open and clear about all aspects of our services. We combine a dynamic and collegiate culture within one of the worlds largest and best capitalised banks. We believe our dedication to developing sustainable long-term solutions for our clients sets us apart.

We actively manage our charity portfolios and provide regular reports and meetings as appropriate. All our clients have dedicated Investment Managers responsible for identifying client objectives or requirements and reporting on all aspects of the portfolio and strategies.

We offer Charity Investment Services to Trustees with investments of more than £500,000.

Highlights

Understanding your requirements - We aim to provide an investment strategy to meet your charity's requirements, based on a discussion of your income, total return and risk parameters.

Risk and Return – We look at future expected returns from different asset classes and their volatility to create diversified portfolios with different targeted outcomes.

Flexibility – We adapt the investment strategies in response to changing charity needs over time.

Ethical policies – We can apply trustees' ethical restrictions to the selection of individual company shares.

Internet access – Secure internet access is available.

Investment Process

The Chief Investment Officer (CIO) and his team manage all charity client portfolios in line with their chosen investment strategy with an emphasis on balancing risk and return.

Contact Us

To learn more, speak to your HSBC Relationship Manager or contact us at:

Email: charity.enquiries@hsbc.com

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Risks to Consider

There are additional risks associated with specific alternative investments such as private equity, hedge funds and commodities within the portfolios; these investments may be less readily realisable than others and it may therefore be difficult to sell in a timely manner at a reasonable price or to obtain reliable information about their value; there may also be greater potential for significant price movements. The value of investments and any income from them can go down as well as up and you may not get back the amount originally invested. Investments in emerging markets are by their nature higher risk and potentially more volatile than those inherent in established markets. Where overseas investments are held the rate of exchange may cause the value of such investments to go down as well as up.