

Investment policy

Aim of policy: to secure the best financial return (within the appropriate level of risk) to be spent on the aims of The Wollstonecraft Society.

Scope: Our constitution allows for the Trustees to deposit or invest funds, employ a professional fund-manager, and arrange for the investments or other property of the Charitable Incorporated Organisation (“CIO”) to be held in the name of a nominee, in the same manner and subject to the same conditions as the trustees of a trust are permitted to do by the Trustee Act 2000.

Objective: we wish to ensure we have funds available to meet the needs of the charity. We currently hold a level of funds that will meet our charitable objectives over the next 1-2 years. Our overriding objective is to protect those funds to ensure they are available for use as required.

Risk appetite: due to the current size of our charity and level of funds available our appetite for risk is low. Our key requirement is the protection of capital.

Environmental and ethical concerns: as at May 2020 our funds are held with Charities Aid Foundation. In making any decisions to invest funds with a different provider we will consider where our funds will be invested within the framework of the charity’s commitment to human rights.

Investment considerations: as at May 2020 our funds are held with Charities Aid Foundation. In making any decisions to invest funds differently we will consider:

- What level of funds we currently hold;
- What level of funding is required when;
- Whether our risk appetite has changed;
- Which providers can ensure our funds are invested within the framework of our commitment to human rights;
- How we will measure the performance of the investment against our objectives
- How we will report on performance
- How often our investments will be reviewed.