

Charity Investment Review Service

From Trust to Confidence

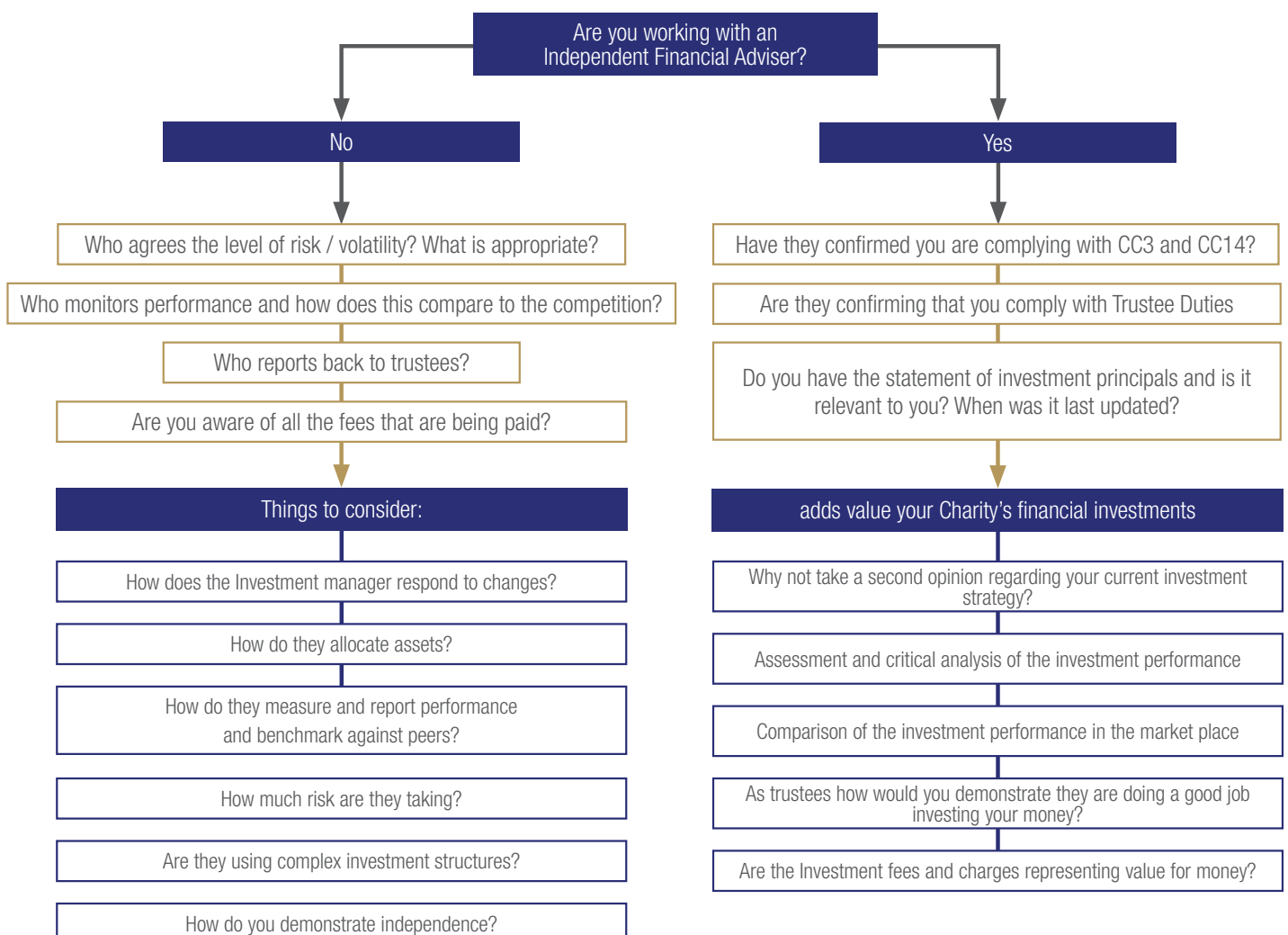
“ Investing exposes charities to risks which, if not properly managed, can affect not just the charity itself but the public’s trust and confidence in the sector more generally. ”

The Charity Commission

Beaufort Wealth Management Ltd review service performs due diligence on your Investment Fund Manager to ensure their recommendations, processes and results are suitable for your Charity, comply with the Charity Commission’s guidelines, and their fees are competitive.

The diagram below highlights how an Independent Financial Adviser, such as Beaufort Wealth Management Ltd adds value to the financial investments of your Charity.

Who is managing your investments?



Who is the service for?

The service is suitable for charities, trustees and not-for-profit organisations who entrust the assets of their organisation to third party wealth managers or investment fund managers and who would value an independent assessment of the recommendations provided and performance delivered.

How the service works?

The Charity Investment Review Service ensures the recommendations and chosen investment strategy is appropriate for your Charity and benchmarks investment performance against peers. The review ensures the fees and charges you are paying represent value for money.

Working with an Independent Advisory firm, such as Beaufort Wealth Management Ltd, will give you the confidence that the investment strategy and recommendations and investment performance are working for your Charity.

A Changing Landscape

A charity's financial requirements and goals will likely change over time, so regular and impartial reviews are important to ensure you are still on track. In addition to this a investment performance will vary over time.

In a nutshell Beaufort Wealth Management Ltd build on the trust you have in your existing Investment Manager by providing an independent due diligence service which will give you the confidence as trustees that the investment advice and investment performance is working for your Charity. The service seeks to ensure through added scrutiny that investment fund managers are fulfilling their obligations to trustees.

Have you seen an increase in fees recently? Have you received a breakdown of the fees and how they are being used? Beaufort Wealth Management Ltd will interpret the fee breakdown and identify if it presents value for money and when there could be scope for negotiation.



Beaufort Wealth Management Ltd

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Beaufort Wealth Management Ltd. is an appointed representative of The Tavistock Partnership Ltd, which is authorised & regulated by the Financial Conduct Authority (FCA) under number 519014. Beaufort Wealth Management Ltd ('the Firm') has an FCA number of 469862.

You can check this on the Financial Services Register by visiting www.fca.org.uk/register/ or by contacting the FCA at 12 Endeavour Square, London E20 1JN, or telephone 0800 111 6768 (freephone), or by contacting The Tavistock Partnership Ltd at The Lypiatts, 15 Lansdown Road, Cheltenham, GL50 2JA.