

Build Financial Resilience

Step 1: Understand the Challenge

Managing a charity's finances is rarely straightforward. You need to balance today's needs with tomorrow's ambitions while navigating:

- Spending, mission, risk, return and ESG priorities
- Governance and regulatory responsibilities
- Trustee and stakeholder considerations
- Inflation and changing financial conditions
- Limited time and resources to research and make informed decisions
- Uncertainty that makes long-term planning more difficult

The result: review whether your reserves, cash and investments are working as hard as they could be.

Step 3: Implement Efficiently

We help turn strategy into action while reducing the governance and administrative burden on trustees and finance teams:

- Access to institutional-grade investment solutions
- Governance, documentation & administrative support to reduce workload
- Coordination between stakeholders and providers
- Transparent fee structures
- Align strategy with your mission, ESG and growth considerations

The result: smoother implementation and less administration.

Step 2: Build the Right Strategy

Every charity is different, so every strategy should be too. One size fits none.

We take the time to understand your organisation, objectives, spending needs, governance structure and future plans before co-designing a tailored strategy.

Together we help you:

- Define success based on a detailed analysis of your objectives
- Balance risk, return and liquidity according to specific timeframes
- Identify and reduce unnecessary costs where they exist
- Develop a bespoke investment strategy
- Access impartial advice to help you select the right managers for the right roles

The result: a clear, evidence-based plan tailored to your charity, not a predefined model.

Step 4: Stay on Track

Markets change. Charities evolve. Objectives shift.

Through ongoing reviews, reporting and support, we help you:

- Keep your strategy aligned to objectives
- Identify opportunities and risks
- Adapt to changing circumstances
- Make informed decisions without increasing demands on internal resources

The result: greater confidence that your financial resources continue to support your mission, today and in the future.

Book a Discovery Call

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