



Charities

Tailored Investment Solutions

At Quantum we provide a holistic approach to supporting charities. We take time to understand your requirements and any constraints on your investment portfolio. Our experienced team of investment professionals can help:

- Set an effective governance framework for you;
- Evaluate and consider investment strategy options;
- Build your portfolio and select investment funds; and
- Achieve the investment return you need, whilst Incorporating any income requirements

We are also experts in Environmental, Social and Governance (“ESG”) matters and can help integrate sustainability into your investment strategy.



Investment governance framework

Our first steps are to review your existing governance structure to ensure your policies and processes fully reflect your objectives and goals. Governance remains at the heart of everything we do and ensuring a robust framework will help ensure the investment strategy, and selected investment managers, remain fit for purpose.



Investment strategy

We will spend time at the outset to understand your objectives and any constraints. This includes investment beliefs such as those relating to sustainability and ESG, so we can incorporate them into the solution as appropriate.



There are three key issues that should be considered when setting an investment strategy:



We would identify an investment strategy that has a reasonable expectation of achieving the agreed goals. Critical to this is understanding the risk associated with different investment allocations. We look at the different portfolio structures, and how best to combine these with income generation (as required).



Portfolio construction

We provide straightforward, transparent, and relevant investment ideas with a focus on risk and cost control.

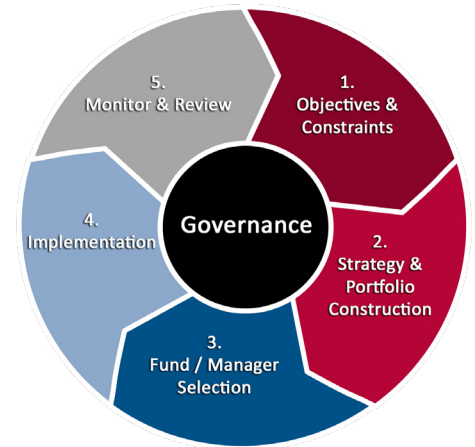
We identify the optimal way to introduce the agreed investment strategy, including the managers and funds to be used and the way they are accessed. We believe in a pragmatic approach, not change for change’s sake, and would therefore take this opportunity to assess the continued suitability of existing funds and managers.

ESG factors, including climate change, are becoming more prominent in the selection of asset classes and fund managers. This emphasis is expected to increase given growing awareness of ESG issues, the potential return and risk benefits from well governed and green focused companies, and clients wishing to ensure investments are aligned with their wider responsible investment policy.



Monitor and review

Following the implementation of the agreed investment strategy, we will work with you to ensure that it remains fit for purpose (including the underlying investment funds). This is achieved through the ongoing monitoring and management process. Our key focus is to provide clear reporting that demonstrates progress and areas for attention, thus assisting in achieving the agreed objectives. We will provide proactive and prompt advice to facilitate effective decision making.



Getting in contact

If you would like to know more about our services for charities, please contact your usual Quantum contact or:

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Who we are

Established in 2000, Quantum Advisory is an independent Financial Services Consultancy that provides solution based services to charities, employers and trustees.

We design, maintain and review investment strategies so that they operate efficiently and effectively. This means that you can get on with doing the things that you do best, therefore saving you time and money.



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