

JM FINN

Portfolio Management for Charities



Dedicated charity specialists with extensive experience

JM Finn is one of the UK's leading investment management companies with over £9 billion of client assets. We work with a number of charities and not for profit organisations who make an essential contribution to public life and their investments are often the cornerstones of the success of the charitable body.

We offer a high quality, personalised investment management service that aims to meet the individual demands of charities and their trustees. Designed to help guide our clients through the increasingly complex investment world, our tailored approach draws on traditional client service values in a world where individual investment manager discretion is often replaced by a process-driven response.

Our investment management service appeals to charities of all sizes, and we are resolute in our focus on providing a personal service to all of our charities, no matter how large or small.

Expanding on our private client heritage, we adopt a comprehensive, but flexible approach to managing charitable assets via a highly consultative process; this helps us achieve a charity's investment objectives.

Awards

Best Wealth Management User Interface Award at Systems in the City 2019



Discretionary Fund Management 2018: Winner, Gold Standard Awards



Top Financial Planning Companies 2018, thewealthnet

Best Discretionary Service 2016 and 2017, City of London Wealth Management Awards

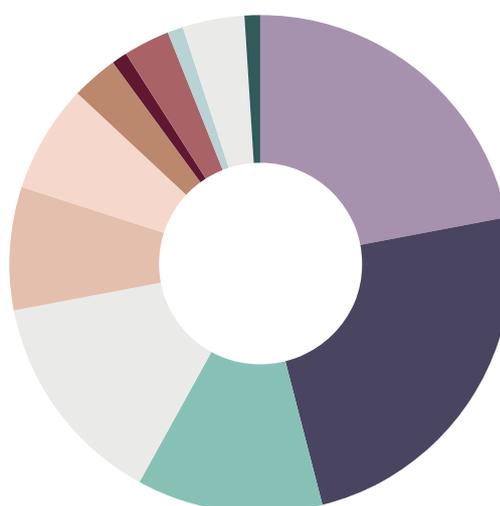


Best online development for JM Finn's client portal at Systems in the City Awards 2017



Who we work with

We are privileged to work with a broad variety of charities thanks, in part, to our client-driven approach. Our focus on a high quality service along with a deep understanding of a charity's requirements, has engendered long term relationships with charities throughout the UK including Livery, Educational, Religious, Children's, Military, Hospice, Housing, Health, Disability and Animal, as well as grant making charities.



- Education
- Grant making
- Religious
- Livery and not for profit
- Health
- Culture
- Disability
- Community
- Relief of Poverty
- Almshouses
- Military and Aerospace
- Sport

A focus on service

Charities and their trustees often place the level of service they receive above all else and we believe our long term experience in managing charity investments, coupled with our investment expertise, is key to our continuing success across the charity sector.

In our view, a successful investment management relationship requires a number of key attributes; our experience of working alongside charities, and their trustees, has taught us to be:

Approachable

Our focus on delivering a highly personal service, where all trustees have direct access to their charity's investment manager, ensures a truly personal relationship whilst delivering the highest level of service.

Consultative

Where many organisations have centralised their investment process, we are unwavering in our belief that a personal service requires the investment manager to manage both the portfolio and the relationship.

Flexible

Thanks to our tailored approach to manage charitable investments we can adapt to a charity's specific needs and be nimble when requirements change.

Trustee support

Administration

We work closely with trustees, treasurers and administrators to ensure the smooth running of all administrative and financial aspects of the charity. Our flexible approach enables us to send instant transaction and cash flow statements in a useful medium to assist with a charity's internal administration.

In addition, all trustees are able to view the portfolio valuation online including all account documentation; this provides a detailed and transparent overview of the portfolio 24/7.

Meeting Rooms

All our charity clients are welcome to use our meeting rooms and catering facilities at our head office at 25 Copthall Avenue in London as well as at any one of our regional offices, in Bury St Edmunds, Bristol, York and Winchester.

Trustee Investment Training

We can accommodate bespoke trustee investment training and are happy to host other events for trustees, so that they can engage with one another and share their knowledge and experience.

Fund Raising

We look to engage with our charity clients on multiple levels; we not only try to help with their fund raising where appropriate, but we also look to support these charities when we feel it aligns with our own internal corporate, social and responsibility (CSR) guidelines.

Why JM Finn?

Tailored portfolios constructed to meet a charity's particular needs

High levels of personal service and communication

Robust investment process

Efficient and experienced in-house administration team

Commitment to trustees and their charities

A legacy of client service excellence

Trust



98%

Have trust and confidence in their investment manager

Confidence



96%

Have trust and confidence in JM Finn as a firm

Communication



95%

Are satisfied with the communication they receive from JM Finn

Referrals



70

JM Finn's NPS* in 2019 which improved from 59 in 2015

An independent survey of 2,094 clients conducted in March 2019 by Savanta. *NPS: Net Promoter Score

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Important Notes

Investment involves risk. The investments discussed in this document may not be suitable for all investors. The value of investments and the income from them can go down as well as up and investors may not get back the amount originally invested. This document is for information purposes only and has no regard for the specific investment objectives, financial situation or needs of any specific investor.

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