

JM FINN

Investment | Wealth

Investment Management for Charities



Dedicated charity specialists with a rich history of excellence

JM Finn is a UK leading wealth management company with a history dating back to the end of World War Two. Our commitment to providing the highest level of personal service to clients has remained a constant throughout: today, we manage around £11 billion of client assets, investing on behalf of individuals, charities and not-for-profit organisations.

JM Finn's Charities Team was set up over 20 years ago: since then, it has grown to become a flagship part of JM Finn's service.

A personal service for charities of all sizes

We work with a diverse range 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.

Regardless of your organisation's size, our dedicated Charities Team will focus on building a long term and trusted partnership with you. This will be rooted in the pursuit of your investment objectives, delivered with a high level of personal service, and all led by your own investment manager.

An award-winning leader in charity investing

This consistency in service quality has given us an outstanding reputation in UK charity investing, winning Best Charity Investment Service at the City of London Wealth Management Awards in five of the last six years.

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

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, whilst building strong, long-term, partnerships.

“Excellent client manager providing good advice and ease of communication.”
JM Finn client

City of London Wealth Management Awards

— 2025



COLWMA 2025
The O bitarisk. Award for Best Charity Investment Service
COMPANY AWARD WINNER JM FINN

— 2024



COLWMA 2024
Best Charity Investment Service
COMPANY AWARD WINNER JM FINN

— 2022



COLWMA 2022
BEST CHARITY INVESTMENT SERVICE
COMPANY AWARD WINNER
JM FINN

— 2021



COLWMA
CITY OF LONDON WEALTH MANAGEMENT AWARDS
WINNER 2021
Best Charity Investment Service

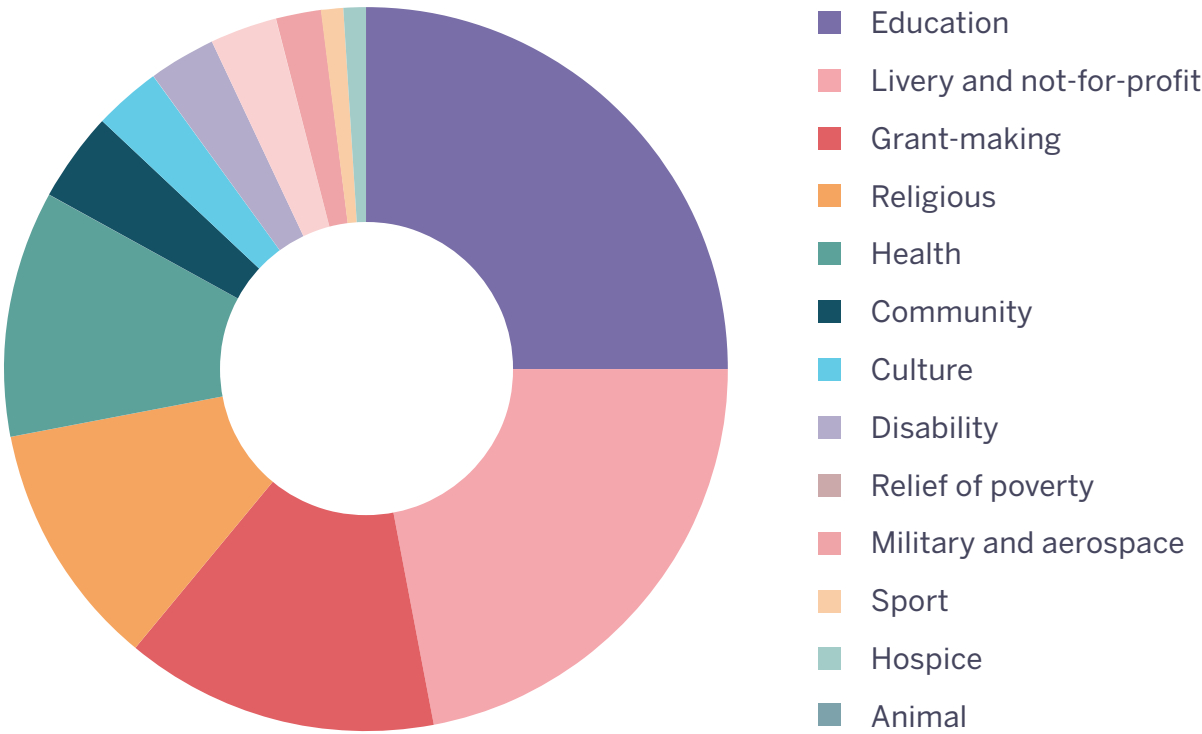
— 2020



COLWMA
CITY OF LONDON WEALTH MANAGEMENT AWARDS
WINNER 2020
Investment Team of the Year for Charities
JM Finn

Who we work with

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.



A focus on client service excellence

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.

Discretionary Portfolio Management

At JM Finn we offer two different ways to invest: our Wealth Management Service and Investment Management Service.

Wealth Management Service

A tailored approach to investment management where your investment portfolio is constructed with your charity's unique requirements in mind. Portfolios are bespoke albeit all underpinned by a strong, robust and repeatable investment process. This service is more appropriate for more complex clients and/or those with special investment requirements.

Regardless of which is right for you, you will receive all the benefits of the award-winning, high quality, personal service that JM Finn is known for.

Investment Management Service

This service follows the same investment process as our Wealth Management Service but invests in a range of multi asset, unitised, portfolios. These tend to appeal to less complex clients and often offer a more cost-effective solution.

Robust investment process

A robust and thorough investment methodology sits at the heart of our investment proposition for Charities. Overseen by the Investment Office, various experts across the firm play a role in researching and assessing the viability of stocks and assets for investment. This includes conducting due diligence by meeting with key company representatives and regular contact with those third-party fund managers in which we invest. We review our investments on an ongoing basis to ensure that the rationale for remaining invested continues to be sound. We also continually search for possible new investment opportunities.

“An excellent team that provides a first class service and takes trouble to maintain client contact.”

JM Finn client

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.

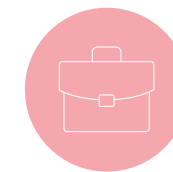
A legacy of client service excellence



Satisfaction

96%

of clients are satisfied with their JM Finn Investment Manager.



Trust

97%

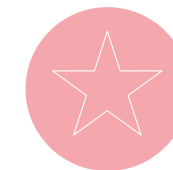
of clients are satisfied that they have a personal relationship with someone they trust.



Communication

95%

Satisfaction rate with Investment Manager communications.



Referrals

Nearly

3 in 5

of our clients have personally recommended us to others.

An independent survey of 1,671 clients within discretionary, advisory, execution only services and Coleman Street Investments (the former name for the Investment Management Service) was carried out by Savanta on behalf of JM Finn in 2023.

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 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.

Fundraising

We look to engage with our charity clients on multiple levels; we not only try to help with their fundraising 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?

High levels of personal service and communication

Robust investment process

Efficient and experienced in-house administration team

Commitment to trustees and their charities - regardless of size



Get in touch

To speak to the Charities Team
about how they could help your
charity, please call

020 7600 1660

or if you would like to speak to your local office:

London 25 Copthall Avenue London EC2R 7AH 020 7600 1660	Bury St Edmunds 60 Abbeygate St. Bury St Edmunds Suffolk IP33 1LB 01284 770 700	Bristol 22-24 Queen Square Bristol BS1 4ND 0117 921 0550
York HQ Building Hudson Quarter Toft Green York YO1 6JT 01904 235 800	Winchester Regency House 13 St Clement St Winchester SO23 9HH 01962 392 130	

Email: charities@jmfinn.com

Website: www.jmfinn.com

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.

JM Finn is a trading name of J.M. Finn & Co. Ltd which is registered in England with number 05772581. Authorised and regulated by the Financial Conduct Authority.



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GA-IMFC-01-0925