

Press Release

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Navigating the investment maze

For so many charities, the thought of asset classes, segregated portfolio management and fixed interest securities leaves them cold. To help them navigate the investment maze, CAF (Charities Aid Foundation) is today launching a free Investment Guide.

Awarded the Crystal Mark for clarity by the Plain English Campaign, the Guide has been designed for charities with little or no investment experience. According to CAF's Head of Investment Services, Nicholas Rickard: "Our research amongst smaller to medium sized charities showed a gap in knowledge for those considering investments perhaps for the first time, and for new trustees picking up on existing investment strategies. We hope to help bridge this gap, and give trustees confidence in dealing with the financial services industry."

Written in simple, straightforward terms, the Guide covers the thorny issues of trustee responsibility, socially responsible investment, asset classes, and risk and diversification. Each chapter deals with a different stage of the decision-making, from assessing a charity's financial situation and long-term needs, to looking at investment options, understanding charges and taxation, and measuring performance.

A comprehensive glossary of investment terms and section on 'The Financial Times Explained', make the Guide essential reading for any charity reviewing its finances.

To find out more about the Investment Guide or to request a copy, visit www.cafonline.org/ccs or call CAF on Tel:08702 643 296.

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Notes:

CAF has been providing financial services to charities for 30 years. The Investment Guide has been produced by CAF Marketing Services Ltd (authorised and regulated by the Financial Services Authority), a wholly owned subsidiary of CAF.