

RATHBONES'
CHARITY SERVICE TO
COMMUNITY FOUNDATIONS



Your guide to our bespoke
investment management service.

RATHBONES
Established 1742



WE UNDERSTAND THAT NO TWO COMMUNITIES ARE THE SAME AND THAT THE REQUIREMENTS OF EACH COMMUNITY FOUNDATION DIFFER

Our bespoke investment management service is well suited to meeting these diverse needs and we tailor each fund to meet individual investment requirements.

WORKING TOGETHER AND SUPPORTING YOU

In an era of economic uncertainty, we recognise the importance of achieving sustainable finances over the long term.

We have been helping trustees manage endowments for over 100 years. Indeed, the Rathbone family were significant philanthropists in the 19th Century before the advent of the welfare state.

Today, from 11 different UK locations we are able to offer a bespoke service, providing community foundations with direct access to their investment professionals and support as required.

UNDERSTANDING YOUR REQUIREMENTS

Our primary purpose is to provide sufficient income from your endowed capital to meet your investment needs; however our service is flexible enough to ensure that individual philanthropists do not lose their identity.

We appreciate your specific requirements and, where appropriate, become directly involved. Our understanding is based on our management of a number of community foundation investment portfolios.

HOW CAN WE HELP?

Individual funds can be created where, if helpful, we can liaise directly with individual donors and/or trustees. Typically each portfolio will be a blend of equities, fixed interest and cash.

Through our network connections, we can sometimes help individual community foundations through our links with organisations such as the Shrievalty and Livery companies.

At a practical level, we can support events, conduct trustee training, provide investment advice, support AGM's and facilitate philanthropy events to include other professionals.

OUR SERVICE

Rathbones manages portfolios for a number of community foundations nationwide, several of which are relatively new mandates. Our regional network of offices allows our investment directors to create strong links with their local community foundations and, in addition, certain Rathbone employees lend direct trustee support and act as ad-hoc advisors.

A particular feature of our service is the close link we are able to forge with individual philanthropists who are encouraged by the level of personal attention which we can give to their investment needs. We are also happy to help attract new donors through joint initiatives with the foundations and meetings with those individuals who are potentially interested.

“Our relationship with Rathbones is one of mutual benefit. They have taken an active role in our donor cultivation and our fund manager has been on hand to give tailored specialist advice to our high value donors to give them peace of mind”.

Cathy Elliott, Chief Executive of Community Foundation for Merseyside

HELPING CREATE A STRONG FUTURE: YOUR COMMUNITY MATTERS TO US

Our philosophy is about service to our clients over the long term, recognising that viable communities are an essential part of the national fabric.

As statutory funding decreases, the requirement to fill the gap will create pressure on other sources of income, but we are equally aware of the need to create long term sustainable investment for the future.

CONTACT US

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