

DUNWICH TOWN TRUST: Investment Policy

Investments must be managed to provide a sufficient income to enable the Trust to carry out its purposes effectively both in the short and longer term. Where possible the value of the assets should be enhanced so as at least to keep pace with inflation. The enhancement of capital and the generation of income must be balanced. A medium risk approach to investment is to be adopted. The Trust's portfolio is reviewed as necessary, in consultation with CCLA, with particular reference to ethical investments. As a rule, the Trust abides by recommendations made by CCLA.

When considering or reviewing investments trustees will have regard to the charity Commission's "Charities and Investment Matters: A Guide for Trustees" (1st August 2016).

First approved by Trustees on: 11/9/2013

Reviewed by: Crispin Clay, Treasurer, June 2015, July 2016; Nick Mayo, July 2017, September 2018 & May 2019.

Approved by Trustees on 11th July 2022.

Signed:*Nick Mayo*.....

Chairman