

Procedures in support of Policy Statement – Investments – dated 16 September 2015

Investment Policy

1. The Treasurer will be responsible for carrying out the stated investment policies of the society, reporting on a regular basis to the trustee body.
2. The administration of the society's Investment Policy will be closely linked with that of its Risk Management Policy.
3. The Treasurer in collaboration with the trustee body will adopt a structured method of assessment of risk for any investment made.
4. The security and viability of the society as a going concern will be a paramount consideration in all investment dealings.
5. In the case of heightened investment activity [e.g. when current assets exceed prudent levels] the Treasurer will have the discretion to form a sub-committee to monitor, review and advise on a suitable investment strategy.
6. Throughout any review process the trustee body will consult the Charity Commission website which contains exhaustive guidance notes on this subject.