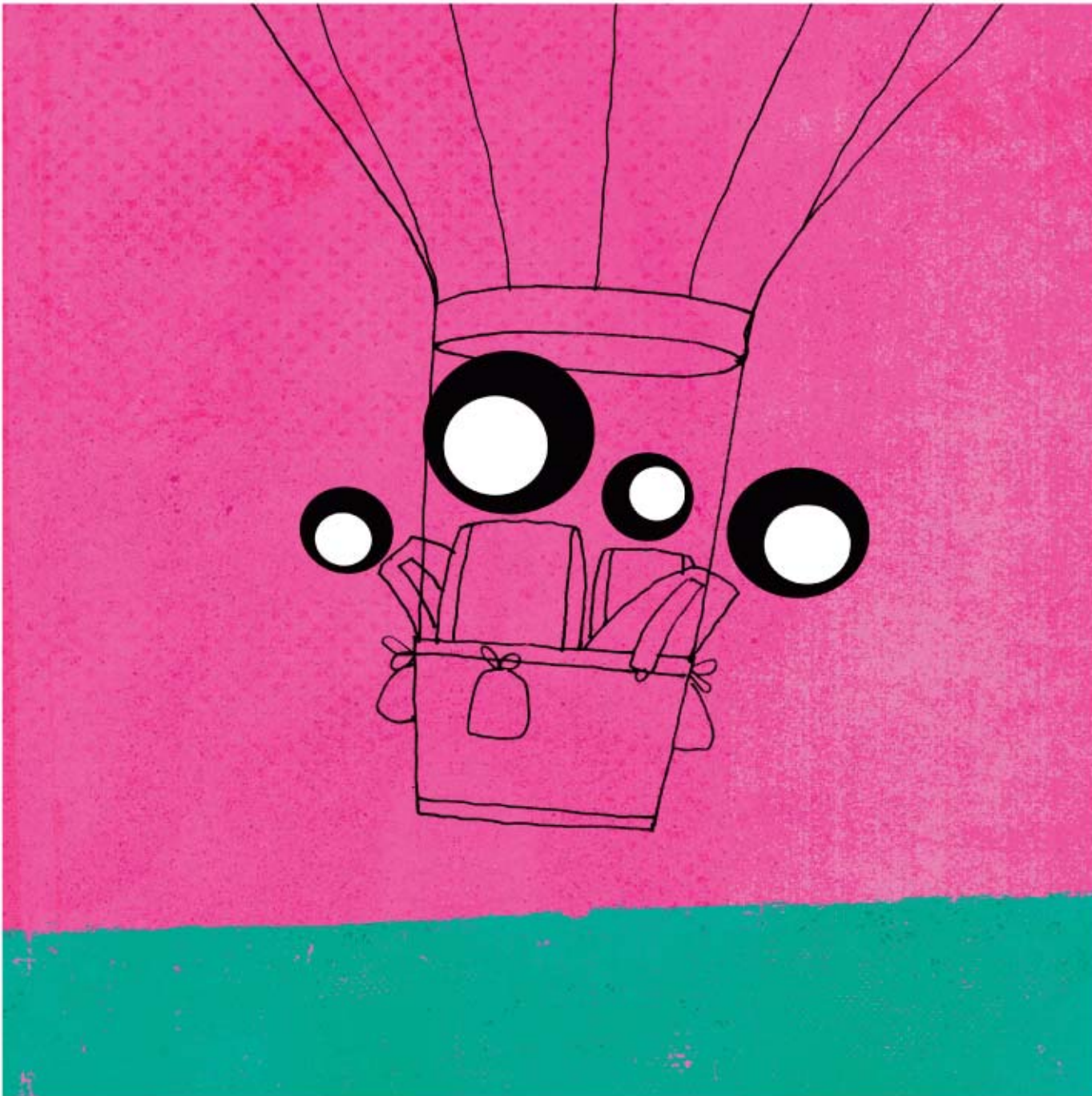


Hello & welcome

We've something we'd like
to share with you

Castlefield



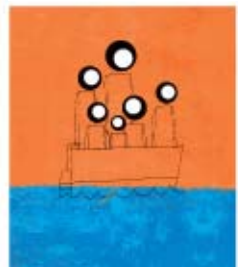


OUR
MARKETING
STRATEGY

Castlefield

Recommended objectives

- Retain our clients
- Recruit more clients
- Create a platform for other business development



Recommended process

- 1) Follow the mindset of the target audience
- 2) Consistently stand out from the crowd
- 3) Direct response value exchanges
- 4) Sustainable, affordable OTS channels
- 5) Data capture & close initiatives
- 6) Encourage & incentivise your network
- 7) Add value to our clients

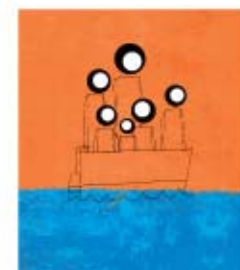


Ultimate audiences

Charities
searching for or
in need of your
expertise

Private clients

Business
pension
schemes



Charity trustees or professional managers

- Mindset
 - Caring
 - Social minded
 - Accountable
 - Duty of care
 - Responsible
 - Passionate about their aims
 - Other charities are competition
 - Must safeguard & grow their hard earned funds
- Consideration
 - Other than provide a service, why should my charity work with you



In short

Are we doing
the right thing?



The competition

Kleinwort

Benson

Our specialist team has worked with charities, and other 'not for profit' organisations, for many years. The service that we offer is one of bespoke advice, individually tailored for each client, as opposed to co-investment in a pooled fund alongside other disparate organisations. We aim to structure solutions that meet your requirements for income and capital protection in a cost-effective manner, and which comply with the parameters set out within the trust deed. We can also advise charities on the incorporation into their strategy of any [socially responsible investment \(SRI\) or ethical requirements](#) that they may have.

Barclays

Wealth

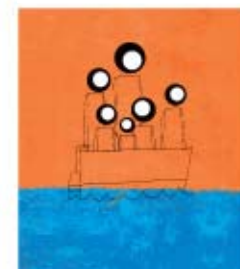
Managing investments for charities is a highly specialised business, and we are one of the UK's leading experts in the field. We have a long-standing commitment to the charity sector, and our specialists currently manage over £2.3 billion* on behalf of 1,700 UK charities of all sizes. Our charities operate in areas as diverse as social welfare, health and medicine, education and training, and philanthropic trusts.

Newton

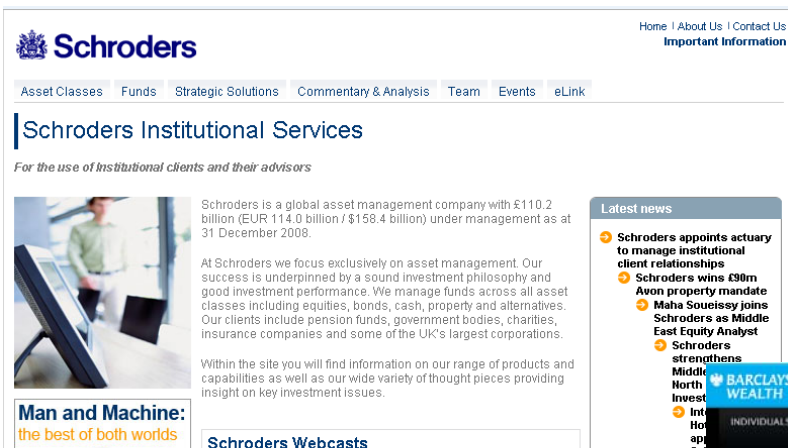
Our specialist charity fund management team is aware of the ever increasing demands placed upon charities and it aims therefore to offer straightforward investment solutions to meet trustees' objectives and to relieve trustees of the work and worry associated with investment. We manage assets for a wide range of charitable clients. Our clients, whether large or small, benefit from our commitment to maintaining high service standards.

Schroders

The specialist charity team at xx has looked after charitable funds since the 1930s and currently manages £2.4 billion of UK and global assets in the not for profit sector. It is a mark of our success that our first charity client is still with us today. We aim to offer an investment management service which emphasises the importance of establishing the optimum strategy for your charity, to create a portfolio that is tailored to each individual charity's needs.



The competition



Schrodgers
Home | About Us | Contact Us | Important Information

Asset Classes | Funds | Strategic Solutions | Commentary & Analysis | Team | Events | eLink

Schrodgers Institutional Services

For the use of institutional clients and their advisors

Schrodgers is a global asset management company with £110.2 billion (EUR 114.0 billion / \$158.4 billion) under management as at 31 December 2008.

At Schrodgers we focus exclusively on asset management. Our success is underpinned by a sound investment philosophy and good investment performance. We manage funds across all asset classes including equities, bonds, cash, property and alternatives. Our clients include pension funds, government bodies, charities, insurance companies and some of the UK's largest corporations.

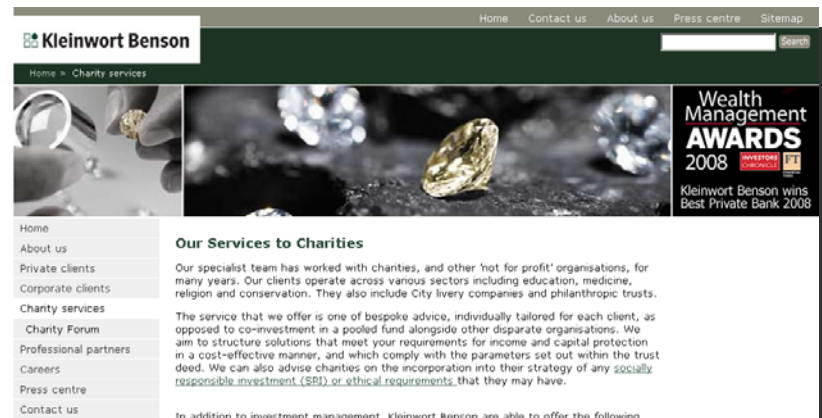
Within the site you will find information on our range of products and capabilities as well as our wide variety of thought pieces providing insight on key investment issues.

Man and Machine: the best of both worlds

Schrodgers Webcasts

Latest news

- Schrodgers appoints actuary to manage institutional client relationships
- Schrodgers wins £30m Avon property mandate
- Maha Soueissy joins Schrodgers as Middle East Equity Analyst
- Schrodgers strengthens Middle North Invest



Kleinwort Benson
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Home » Charity services

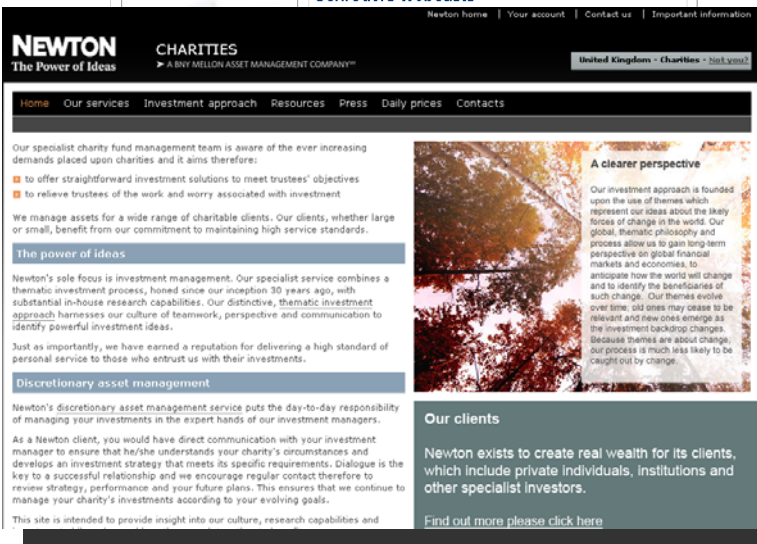
Wealth Management AWARDS 2008
Kleinwort Benson wins Best Private Bank 2008

Our Services to Charities

Our specialist team has worked with charities, and other 'not for profit' organisations, for many years. Our clients operate across various sectors including education, medicine, religion and conservation. They also include City livery companies and philanthropic trusts.

The service that we offer is one of bespoke advice, individually tailored for each client, as opposed to co-investment in a pooled fund alongside other disparate organisations. We aim to structure solutions that meet your requirements for income and capital protection in a cost-effective manner, and which comply with the parameters set out within the trust deed. We can also advise charities on the incorporation into their strategy of any socially responsible investment (SRI) or ethical requirements that they may have.

In addition to investment management, Kleinwort Benson are able to offer the following associated services to charities:



NEWTON CHARITIES
The Power of Ideas
A BNY MELLON ASSET MANAGEMENT COMPANY

United Kingdom - Charities - Best asset

Home | Our services | Investment approach | Resources | Press | Daily prices | Contacts

Our specialist charity fund management team is aware of the ever increasing demands placed upon charities and it aims therefore:

- to offer straightforward investment solutions to meet trustees' objectives
- to relieve trustees of the work and worry associated with investment

We manage assets for a wide range of charitable clients. Our clients, whether large or small, benefit from our commitment to maintaining high service standards.

The power of ideas

Newton's sole focus is investment management. Our specialist service combines a thematic investment process, honed since our inception 30 years ago, with substantial in-house research capabilities. Our distinctive, thematic investment approach harnesses our culture of teamwork, perspective and communication to identify powerful investment ideas.

Just as importantly, we have earned a reputation for delivering a high standard of personal service to those who entrust us with their investments.

Discretionary asset management

Newton's discretionary asset management service puts the day-to-day responsibility of managing your investments in the expert hands of our investment managers.

As a Newton client, you would have direct communication with your investment manager to ensure that he/she understands your charity's circumstances and develops an investment strategy that meets its specific requirements. Dialogue is the key to a successful relationship and we encourage regular contact therefore to review strategy, performance and our future plans. This ensures that we continue to manage your charity's investments according to your evolving goals.

This site is intended to provide insight into our culture, research capabilities and

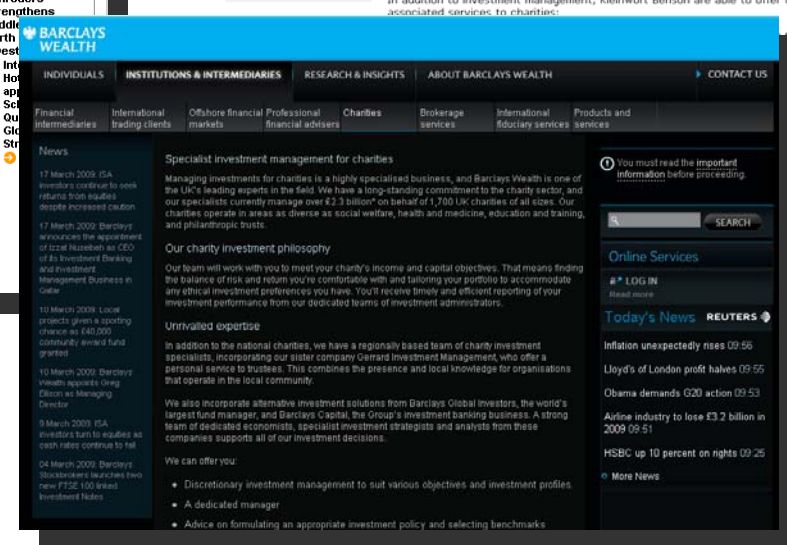
A clearer perspective

Our investment approach is founded upon the use of themes which represent our ideas about the likely forces of change in the world. Our global, thematic philosophy and process allow us to gain long-term perspective on global financial markets and economies, to anticipate how the world will change and to identify the beneficiaries of such change. Our themes evolve over time - old ones may cease to be relevant and new ones emerge as the investment backdrop changes. Because themes are about change, our process is much less likely to be caught out by change.

Our clients

Newton exists to create real wealth for its clients, which include private individuals, institutions and other specialist investors.

Find out more please click here



BARCLAYS WEALTH
Investment | International | Offshore financial | Professional | Charities | Brokerage services | International | Products and

Financial intermediaries | International trading clients | Offshore financial markets | Professional financial advisers | Charities | Brokerage services | International fiduciary services | Products and services

News

- 17 March 2009: IGA investors continue to seek returns from equities despite increased caution
- 17 March 2009: Barclays announces the appointment of Ezzad Hussein as CEO of its Investment Banking and Investment Management business in Qatar
- 10 March 2009: Lipor strategy given a sporting chance as £40,000 Community service fund granted
- 10 March 2009: Barclays' wealth services group (BWS) as Managing Director
- 9 March 2009: IGA investors' task to stabilise as cash rates continue to fall
- 04 March 2009: Barclays (Stockholders) launches two new FTSE 100 Index Investment Funds

Specialist investment management for charities

Managing investments for charities is a highly specialised business, and Barclays Wealth is one of the UK's leading experts in the field. We have a long-standing commitment to the charity sector, and our specialists currently manage over £3.3 billion* on behalf of 1,700 UK charities of all sizes. Our charities operate in areas as diverse as social welfare, health and medicine, education and training, and philanthropic trusts.

Our charity investment philosophy

Our team will work with you to meet your charity's income and capital objectives. That means finding the balance of risk and return you're comfortable with and tailoring your portfolio to accommodate any ethical investment preferences you have. You'll receive timely and efficient reporting of your investment performance from our dedicated teams of investment administrators.

Unrivalled expertise

In addition to the national charities, we have a regionally based team of charity investment specialists, incorporating our sister company Cairnd Investment Management, who offer a personal service to business. This combines the presence and local knowledge for organisations that operate in the local community.

We also incorporate alternative investment solutions from Barclays Global Investors, the world's largest fund manager, and Barclays Capital, the Group's investment banking business. A strong team of dedicated economists, specialist investment strategists and analysts from these companies supports all of our investment decisions.

We can offer you:

- Discretionary investment management to suit various objectives and investment profiles.
- A dedicated manager.
- Advice on formulating an appropriate investment policy and selecting benchmarks.

* You must read the important information before proceeding.

Online Services

- LOG IN

Today's News REUTERS

- Inflation unexpectedly rises 09:56
- Lloyd's of London profit halves 09:55
- Obama demands G20 action 09:53
- Airline industry to lose £3.2 billion in 2009 09:51
- HSBC up 10 percent on nights 09:25

More News



Charity Sector

one of our



The norm

- The words
 - Specialist
 - Bespoke advice
 - Individually tailored
 - Structured solutions
 - Cost-effective
 - Leading experts
 - Investment solutions
 - Wide ranging charity clients
 - Xxx charities, xxxbn assets under management
- The style
 - Bland
 - Process driven
 - Jargonistic
 - With a complete lack of personality

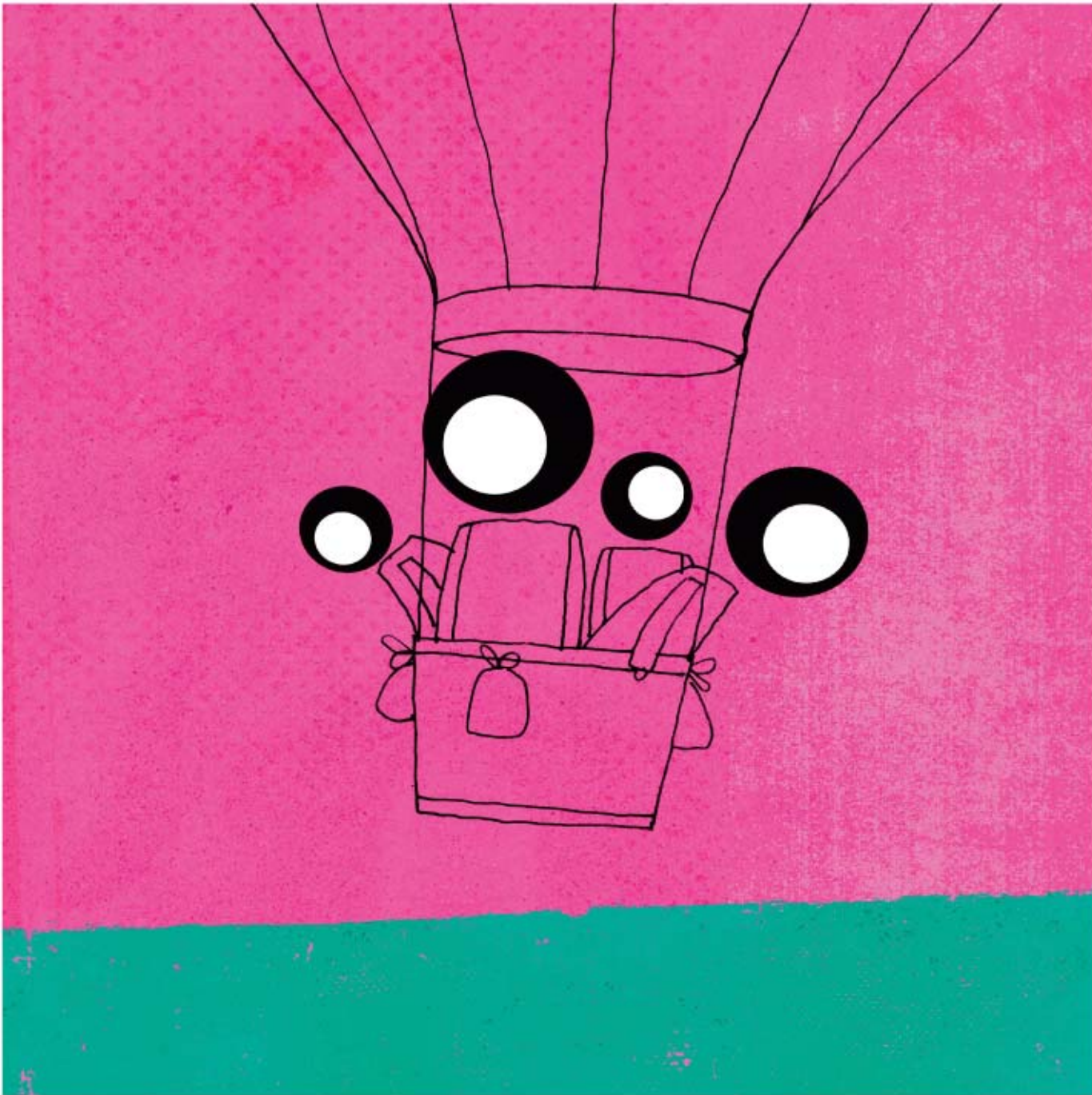


Castlefield



Putting nothing at risk





THIS IS OUR
BRAND

Castlefield

Positioning

Castlefield manages investments on behalf of clients, including over 50 charities, in line with their individual objectives and wishes. However, it's not just our exceptional people, carefully defined processes or track record of performance that lead so many people to trust Castlefield. **It's our aim that each and every client has a share in our business, our profits and a say in how we are run.** It's this commitment that puts Castlefield closer to clients than any other investment manager.



Values

- We believe in:
 - Knowing our sector inside out to deliver what's expected of us
 - Being exceptionally close to our clients and aligned with their aspirations
 - Managing investments in line with our clients' individual objectives
 - Making it easy for our clients to see how they are doing relative to alternatives, whilst clearly understanding what we are doing for them
 - Sharing our business & our success with our employees & our clients

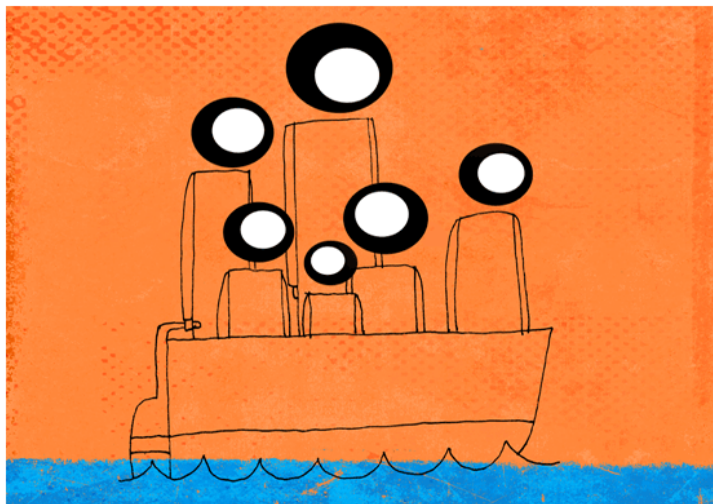


This is Castlefield

Castlefield

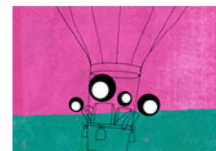
- Home
- Who we work with
- How we do things
- Who we are
- Our team
- How we perform
- Our blog
- Publications
- Get in touch
- Small Print

Can you afford not to be part of it?



We're in this together

Castlefield manages investments on behalf of clients, including over 50 charities, in line with their individual objectives and wishes. However, it's not just our dedicated people, carefully defined processes or track record of performance that leads so many people to entrust Castlefield. It's our aim that each and every client has a share in our business, our profits and a say in how we are run. It's this commitment that puts Castlefield closer to clients than any other investment manager. As a boutique investment manager, Castlefield is incredibly focused and incredibly close to our clients. We know our business inside out and we care passionately about it. We want to share that passion with you.



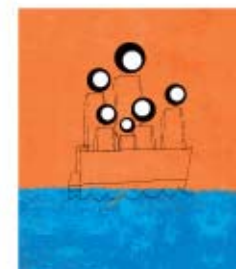
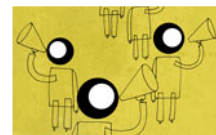
Pocket guide to charity investment

[What charities want & don't want doing with their funds.](#)

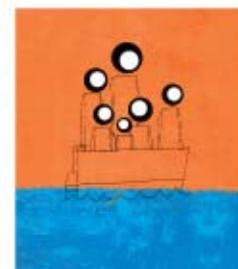
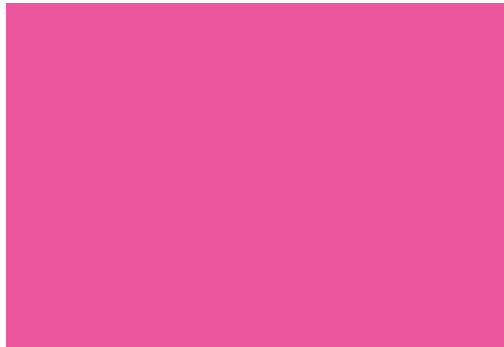


Charity investment performance

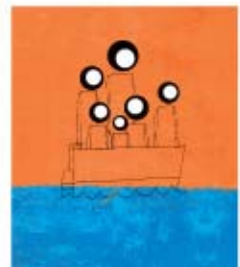
[How well are you doing compared to other charities?](#)



Our colours



Illustrations



Our ads



We'd love you to join us

Castlefield takes care of the investments of over 50 charities, in line with their individual objectives and wishes. However, its not just our exceptional people, carefully defined processes or track record of performance that lead so many trustees to select Castlefield. It's our aim that each and every client has a share in our business and in our profits. This commitment puts Castlefield closer to charities than any other investment manager. We don't expect trustees to consider changing how their investments are managed on the strength of an advertisement, but we'd love you to take a look at our Pocket Guide to Charity Investment or Benchmark of Charity Investment Performance. Copies of both documents are available free of charge to trustees and senior charity executives, to request your copy, just call John Eckersley, one of our founding partners on 0161 233 4890 or email john.eckersley@castlefield.com.

To find out more about our unique way of sharing with clients please visit www.castlefield.com

Castlefield is a trading name of Castlefield Investment Partners LLP who are authorised and regulated by the Financial Services Authority. Registered in England & Wales No. 0C302833. Registered Office 215-219 Chester Road, Manchester, M15 4JE.



The little book of charity investment

Castlefield



Take us to new heights

Senior Relationship Manager
Partner, designate
Attractive salary + perks + something special to us

Castlefield is a boutique investment business with a different ethos. We're looking for someone special to help us soar further. Ambitions, bags of experience and a commitment to our customers. To get on board, see what we're after at [castlefield.com](mailto:john.eckersley@castlefield.com) or email john.eckersley@castlefield.com.

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To find out more and request a free copy of our Benchmark of Charity Investment Performance please visit www.castlefield.com or email john.eckersley@castlefield.com.

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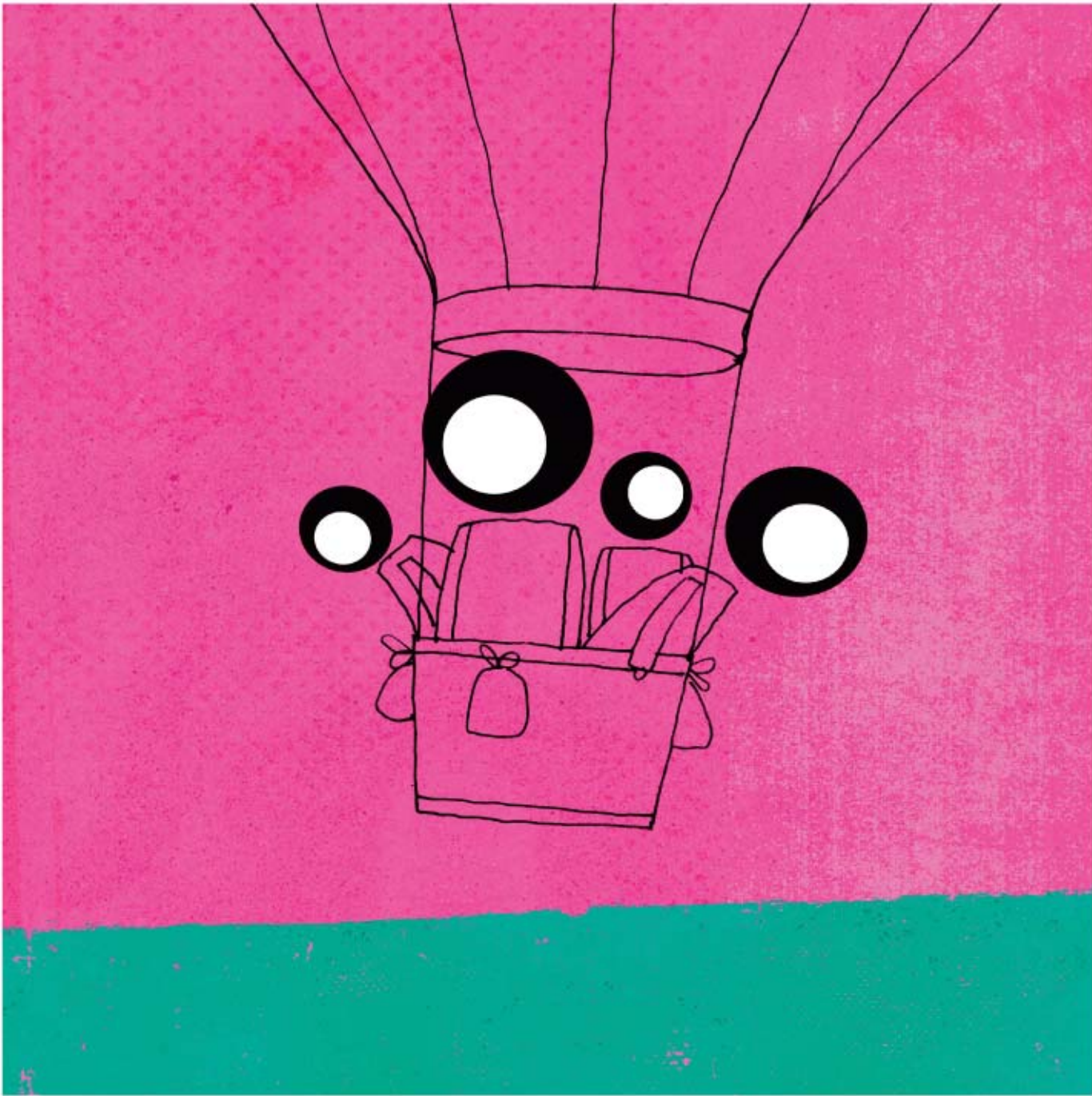
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Castlefield

Next steps

- Take a look at the little books of Castlefield
- Your feedback
- Launch the brand to clients
- Roll-out the new brand across everything we do
- Target new business opportunities





Castlefield