


Thank you for taking the time to read this document. We really appreciate your continuing help in making Castlefield a success. After all, we're all in this together.

John & David.

Castlefield

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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 exceptional people, carefully defined processes or track record of performance that leads so many people to entrust Castlefield, it's the fact that each and every client has a share in our business and a say in who we are run. It's this commitment that puts Castlefield closer to clients than any other investment manager.

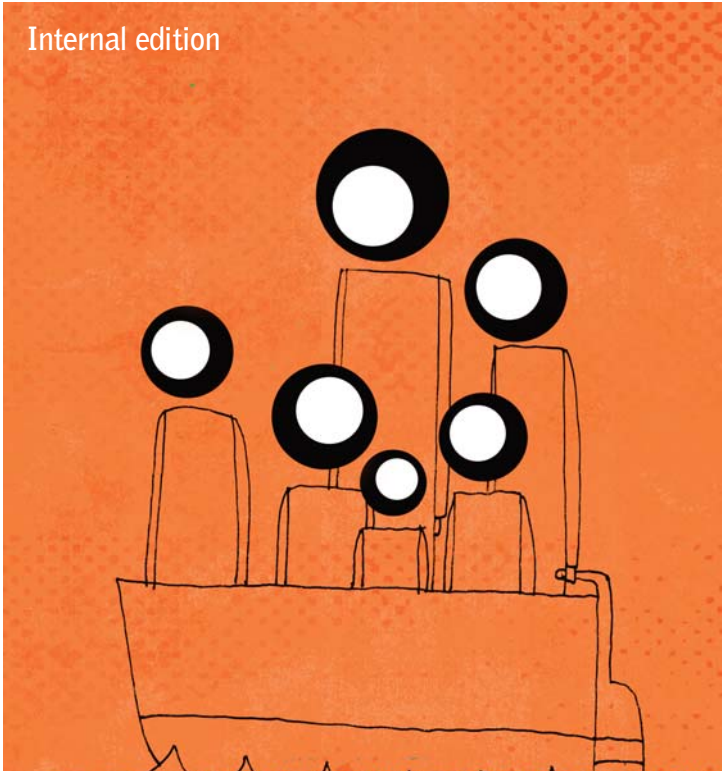
We hope you enjoy finding out more here. Should you have any queries, please get in touch as we'd love to hear from you.

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?](#)

Any Questions
[Just submit your query here.](#)

Internal edition



The little book of Castlefield

Can you afford not to be part of it?

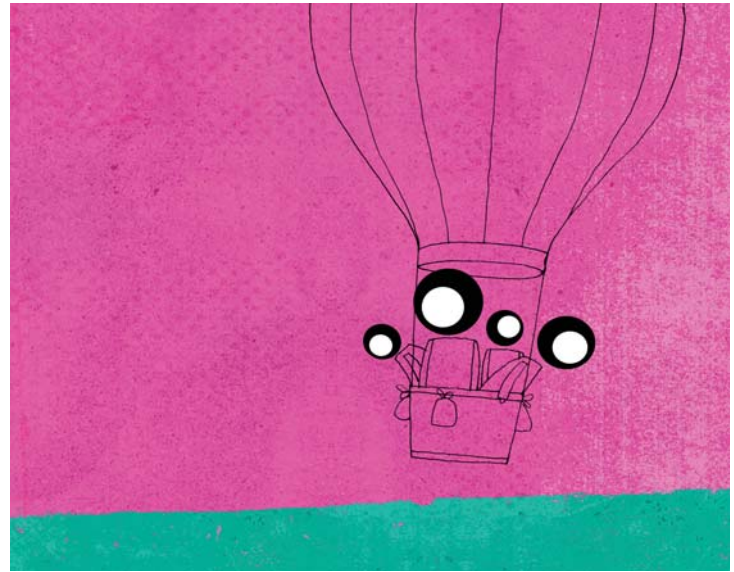


John Eckersley
Managing Partner

David Soutar
Managing Partner

As a boutique investment manager, Castlefield has always been incredibly focused and incredibly close to our clients. We know our business inside out and we care passionately about it. But we've not always communicated that expertise in the most effective way. Our revised brand and identity address the challenge head on.

This guide sets out our vision of the Castlefield brand and the central role you have in it. Ours is a people business. Which means your contribution, involvement and backing are, as always, crucial to our ongoing success.



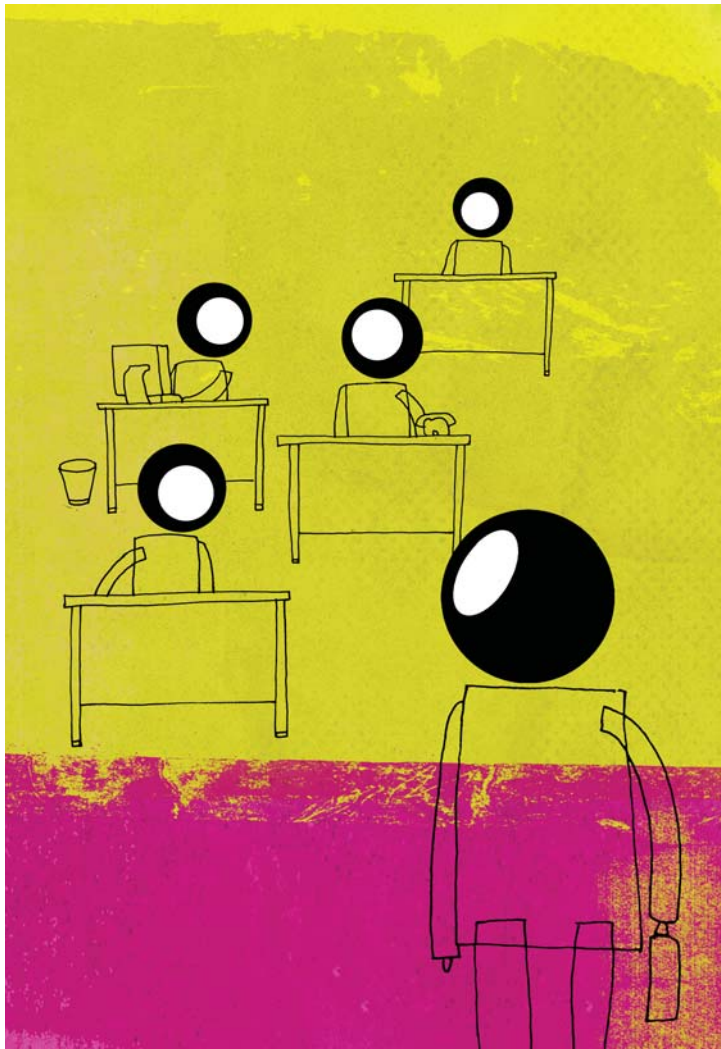
Taking us to new heights

In the highly competitive environment in which we operate, it's critical that we continue to evolve and that we stand out as the investment manager of choice. Our brand and visual identity is a key element in achieving this.

We want Castlefield to be much more than a name. We want it to be a powerful brand. A brand that inspires confidence. One that aligns us with the aspirations of our clients. A brand that can be trusted. A brand that puts us ahead of the competition.

Our shared ownership and, the fact that every client can effectively share in our business and our profits, lies at the heart of our brand. It's our point of distinction and differentiation and it's the driving force behind our success.

'Can you afford not to be part of it?' is our mantra. After all, it encapsulates everything Castlefield is about – a complete dedication to work for the benefit of our clients and an ongoing objective of being closer to them than any other investment manager.



Our brand is essentially what we stand for in the minds of our clients, potential clients and other businesses that interact with us. It's much more than a name or an image. It encompasses our personality, our values and our capabilities, as well as our visual identity. In effect, everything we do, everything we say and everything that features our name or logo impacts the perception of our brand.

Positioning

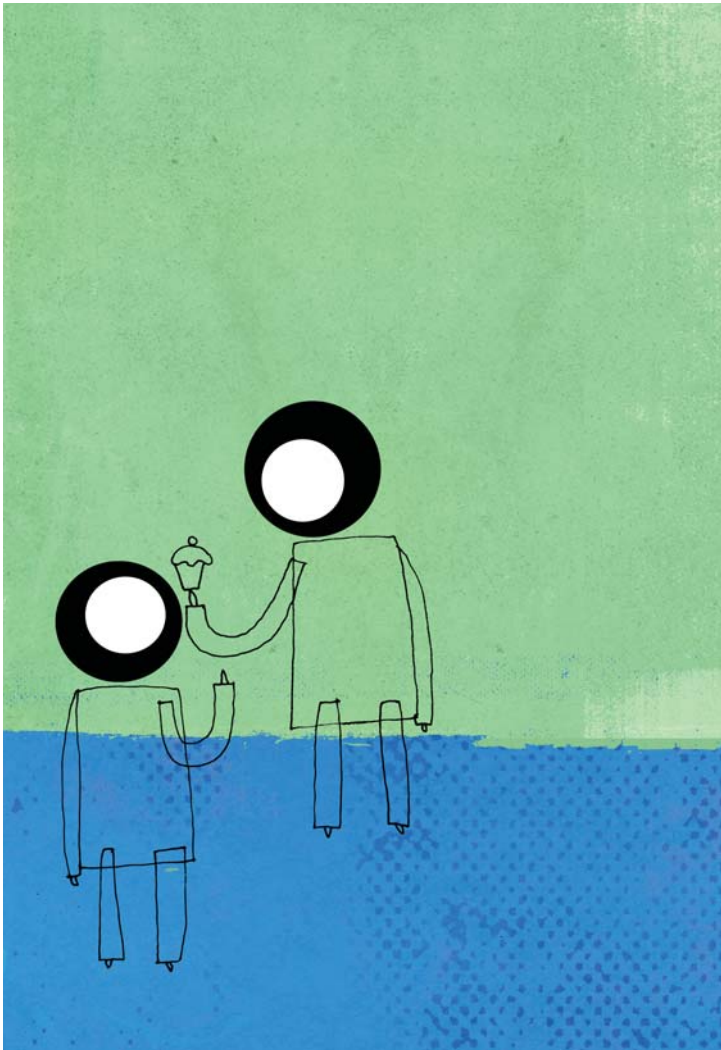
Our brand has been designed to attract positive attention in the marketplace. And, most importantly, to position us effectively for the future. We cannot control the perceptions of our audiences, but we can influence their views – especially through the consistency of our action. That's why we have a set of values, a positioning statement, and visual identity guidelines. In conjunction with outstanding client service, and our shared ownership, they are our cornerstones of success.

The following positioning statement summarises our brand story. It encapsulates our values, outlines who our brand is for, how we operate and what our clients can expect from us.

We're all 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 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.”

In the same way that we must apply visual guidelines to all our activities, we must strive to include our positioning statement wherever possible. Similarly, the tone of voice and style of the positioning statement should be used as the basis for all communications – for letters, presentations, proposals etc.



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 and our success with our employees and our clients

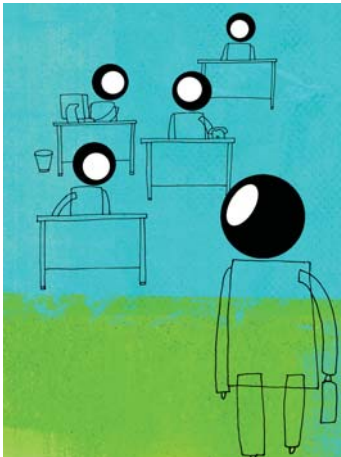
Shared values

In the branding context, the quality and consistency of our actions are all important. So it's essential that we all deliver our services in a way that supports what we want to achieve.

Every time someone encounters an aspect of Castlefield – whether in person, over the phone, via the internet or in writing – it influences their perception of us and ultimately their buying decisions. If their experience is good, they are likely to make Castlefield their first choice; if poor, they are more likely to choose a competitor. It really is a case of actions speaking louder than words.

To help to guide the way we act, we have defined a set of values. Underpinning our shared ownership and client commitment, they represent the essence of how we want to be perceived. Our values set us apart from our competitors and are designed to keep us 'front of mind' with clients and potential clients.

By aligning our own individual actions with our values and by working together, we achieve our overriding objective of being closer to our clients than any other investment manager.



A new look

Whilst our brand isn't just about our visual identity, the consistent 'look and feel' of all our marketing tools, stationery, website etc helps to reinforce our brand image.

The design base for Castlefield has been developed to create an impact. It features modern typefaces, distinctive imagery and a vibrant colour palette consisting of a range of modern colours.

The imagery in particular is something clients and staff alike notice immediately. We fervently believe that it is impossible to capture our personality through bland photographs or stock imagery. The type of imagery that all our competitors use and that you see in all sorts of marketing materials. By commissioning a series of original illustrations instead, we're making a bold statement and have a very different look to run of the mill investment managers.

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 the fact that each and every client can share in our business and in our profits. It's this commitment that puts Castlefield closer to charities, than any other investment manager.

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

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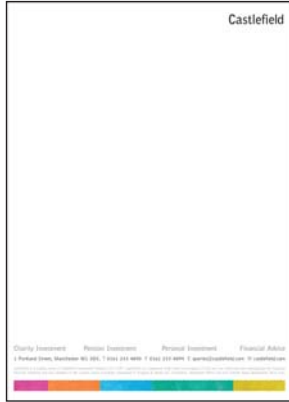
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The little book of charity investment

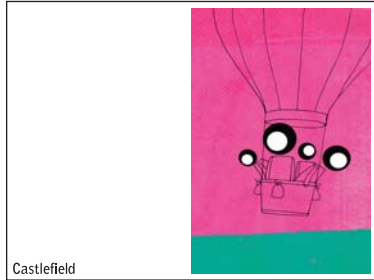
Can you afford not to be part of it?

Castlefield

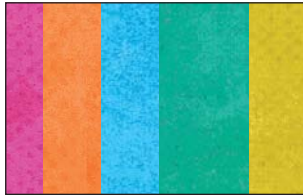
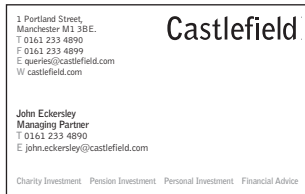
Letter Head



Powerpoint presentation



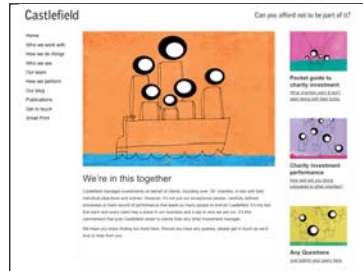
Business card



Email footer



Web home page



Consistent communication

The new visual identity features on our business cards, letterheads, corporate presentations, email communications and website, and is incorporated into all new marketing materials.

A key piece of the branding jigsaw is consistency of communication. So it is really important that all marketing and client documents that you produce are in line with the brand identity. To help you with this, all the core material that you use in your role has been developed in template form.

You can access the following items at any time via the intranet:

- Letter template
- Powerpoint template
- Email footer
- Electronic copy of logo

We cannot stress enough that to avoid diluting the Castlefield brand you must always apply the various elements of our brand consistently and without modification.

Castlefield



Focused promotion

With our new brand identity in place, Castlefield is proactively 'going out to market'. An extensive marketing campaign is being developed to promote the brand and increase awareness of our business and capabilities.

Corporate and social enterprise clients and potential clients, as well as individuals, will be targeted on an ongoing basis. You'll find Castlefield has a regular advertising presence in targeted investment management trade press and directories. We will also be conducting highly targeted direct mail campaigns to decision makers in the charitable and pension sectors.

We will also greatly increase our focus on electronic communications, with a Google adwords campaign and regular promotional 'e-shots'.

Opposite: Images used throughout website

Below: Trade press advert – full & quarter page

We'd love you to join us

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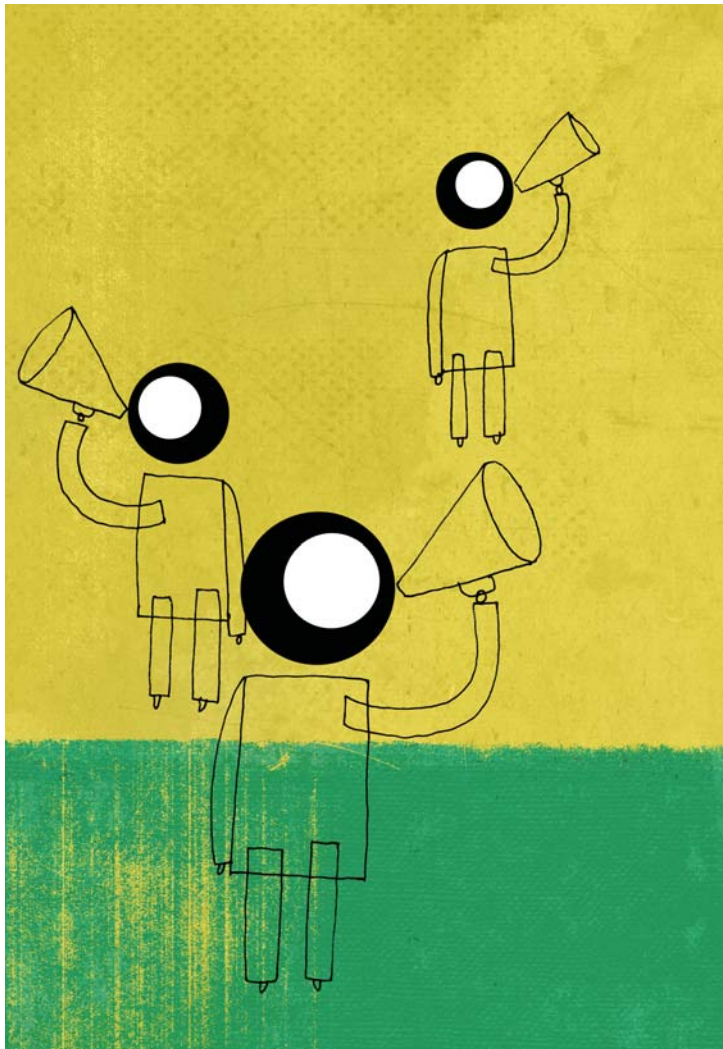
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Castlefield



10 golden rules

- Always act in a way that is consistent with our values
- Never alter or extend our list of values
- Refer to the positioning statement when describing how we operate and what our clients should expect from us
- Never adapt or alter the logo in any way – such as stretching or condensing it. Instead always use the electronic version provided
- Ensure our brand positioning statement – or a summary – is featured within external communications wherever possible
- Ensure that any materials – physical or electronic – are in keeping with the overall brand look
- Communicate in plain English, avoiding jargon and describing the benefits that we provide in as simple terms as possible
- Avoid using old materials – notifying the management team of anything that needs updating
- Remember your actions influence our audiences and should support our overarching value of shared ownership
- If in doubt, ask the management team for guidance

Where you fit in

We have the foundations for an exceptional brand personality, but we will only be as good as our staff. We each share a vital role in shaping and creating the Castlefield brand.

Together we can:

- Increase awareness of our business
- Ensure a positive experience of our services
- Ensure our capabilities are correctly perceived
- Consistently convey our message

To help us along our path, please comply with these guidelines, familiarising yourself with the principles of this document and follow the golden rules in all that you do.