

Invitation

Events for trustees 2010

Michael Quicke, chief executive, CCLA Investment Management Limited is pleased to invite you to join him for an afternoon of trustee development and an evening examining the future outlook of long-term investments for UK charities.

Please choose from one of the dates and locations below to suit you:

Dates and venue

Monday 18 January, Oxford

Tuesday 23 March, Norwich

Wednesday 14 April, Plymouth

Wednesday 5 May, York

Wednesday 23 June, Edinburgh

Wednesday 14 July, Nottingham

Wednesday 15 September, Coventry

Tuesday 12 October, Guildford

Wednesday 3 November, Newcastle

Thursday 9 December, Bath

SEMINAR DETAILS

Investment strategy – a step-by-step guide for trustees showing how an investment policy is set, what it consists of, how to find a manager and what monitoring and measurement is all about

Investment basics – an introductory level session for those who want to gain a basic understanding of the main asset classes and concepts, covering the main asset classes, principles of diversification, portfolio construction

Who's eating your lunch – a look at the complicated world of costs and charges in the fund management industry

Managing the big risks – climate, excess and reputation

Total return – golden goose or just another turkey

Location, location, location – is property the right place now for your investment

Open space – interactive sessions where delegates shape the agenda and content through the use of digi-voting technology

Framing the challenges for charity investors: Seizing the opportunities – an insightful view of global market and economic developments by CCLA chief investment officer, James Bevan

Asset allocation – the advice you get could determine over 80% of your investment returns; are your assets working for the cause as hard as you are

Drinks reception and dinner – exploring issues and ideas arising throughout the day, including the right tactics for the current environment

TO BOOK YOUR PLACE

Email ccla@eesolutions.co.uk or visit our website www.ccla.co.uk