

**CCLA**



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# Invitation

## **CCLA trustees event**

**Wednesday 14 July 2010**

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

You may choose to attend for all, or part, of the programme to suit your availability and areas of interest.

### **Venue**

**The Nottingham Arena  
Bolero Square  
The Lace Market  
Nottingham  
NG1 1LA**

# CCLA trustees event

Wednesday 14 July 2010

## Programme

- |                    |   |
|--------------------|---|
| <b>1.30–1:50pm</b> | Registration / refreshments   |
| <b>1.50–2.20pm</b> | <b>Seminar one:</b> An investment strategy?   |
| <b>2.20–3.10pm</b> | <b>Seminar two:</b> Investment basics   |
| <b>3.10–3.30pm</b> | Refreshment break   |
| <b>3.30–4.30pm</b> | <b>Seminar three:</b> Interactive 'open space' sessions   |
| <b>4.30–4.45pm</b> | Short break   |
| <b>4.45–5.30pm</b> | <b>Seminar four:</b> Investment strategy  |
| <b>5.30–6.00pm</b> | Drinks reception  |
| <b>6.00–6.45pm</b> | <b>Framing the challenges for charity investors: seizing the opportunities –</b><br>Facilitated by Michael Quicke, CCLA chief executive |
| <b>6.45–8.30pm</b> | <b>Dinner</b> and discussion chaired by Michael Quicke  |

# Seminar details

## **Seminar one: An investment strategy? (1.50–2.20pm)**

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

## **Seminar two – Investment basics (2.20–3.10pm)**

An introductory level session for those who want to gain a basic understanding of the main asset classes and concepts such as diversification and asset allocation. The aim of the presentation is to consider the nature of cash, bonds, equity and property investment, the role that each can play in a portfolio, together with potential risks and returns.

- The main asset classes
- Principles of diversification
- Portfolio construction via asset allocation

## **Seminar three – Interactive ‘open space’ sessions (3.30–4.30pm)**

You are in charge of the programme. Choose from:-

- Who is eating your lunch? A look at the complicated world of costs and charges in the fund management industry
- Managing the big risks: climate, excess & reputation
- Total return – golden goose or just another turkey?
- Location, location, location – is property the right place now for your investment?
- Or develop your own sessions on the day.....

## **Seminar four – Investment strategy (4.45–5.30pm)**

A review of the current investment environment identifying the challenges facing investors and the strategies best placed to meet them.

## **Framing the challenges for charity investors: seizing the opportunities – (6.00–6.45pm)**

Delegates will shape the agenda and content of this interactive session through the use of digi-voting technology.

## **Dinner (6.45–8.30pm)**

Michael Quicke will chair a dinner discussion allowing guests to explore the important issues and ideas arising on the day.

## About CCLA

CCLA exists to help charities make more money from their investments.

We were established more than 50 years ago, and are the UK's largest manager of charity funds.\*

Our clients benefit from the professionalism and expertise of leading advisers. But meeting your objectives is not just about selecting individual investments. It is essential that your portfolio is constructed to meet your organisation's particular needs and preferences.

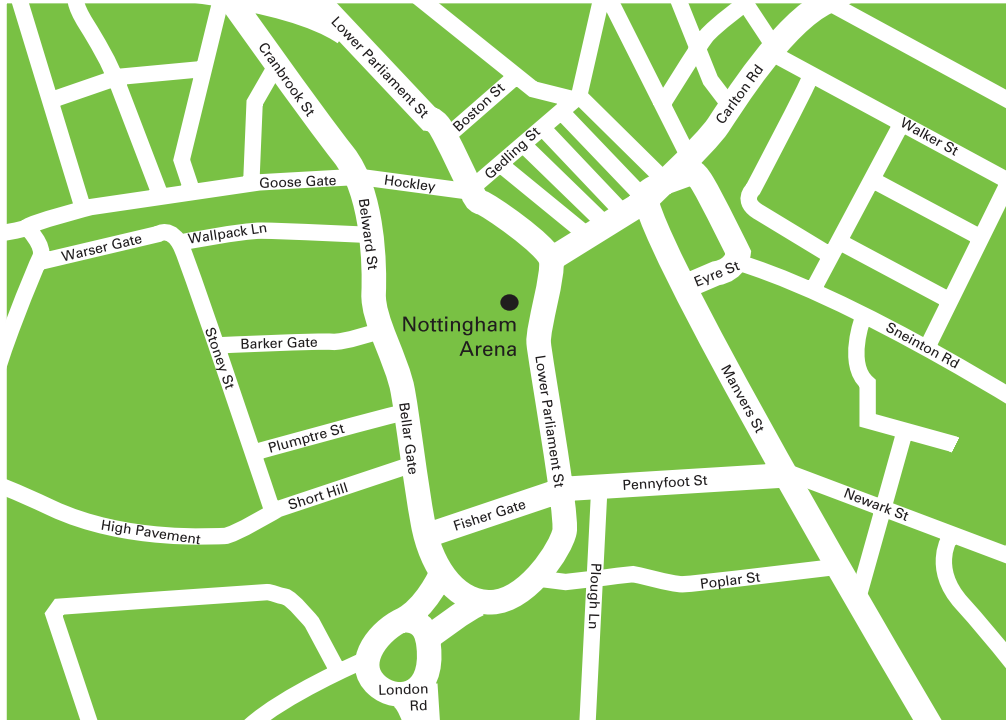
So whether your priority is capital growth, income, or a combination of the two – and whatever ethical or social criteria you have – we will work with you to design and maintain the right blend of assets.

CCLA is owned by its clients, which means we do not have to meet the financial demands of external shareholders.

We use this advantage to minimise costs for our clients. But we don't think our highly competitive fees are the reason charities choose to work with us. We believe that our commitment to meeting their investment needs is second to none, and would be delighted to discuss how we might do the same for you.

\* Source: Charity Finance

## Directions



The Nottingham Arena is 5 minutes from Nottingham train station, 15 minutes from the M1 motorway and 30 minutes from East Midlands Airport. The closest NCP car park is Stoney Street, which is within a 2 minute walk. There is also a disabled car park just next to the arena.



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