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TRUSTEE INVESTMENT
GUIDE Trustee
investment is a
complex area, but also
an important role. This

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is especially true if you have never been in charge of a trust before. This article is intended as a trustee investment guide, and is designed to help you understand the responsibilities and duties that you will face in your role.

Trustee Investment Guide - all about trustee investments

The trustees must also review the investments

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on a regular basis to ensure they remain suitable for the trust. Other factors. In addition to the standard investment criteria, the trustees should also consider the following: The nature and terms of the trust; Their investment powers; The size of the fund; The need for income or capital growth or both

Trustee investment -
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Techzone

for trustees and their financial advisers when considering the investment strategy of a trust. These include:

- the financial objectives of the trust
- the tax status of the trust and its beneficiaries
- the permissible investments available to the trustees
- the legal requirements of the trust provisions.

Each area needs to be

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considered in

INVESTMENT FOR TRUSTEES - Old Mutual Wealth

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Recognizing the way
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Investing the trust
assets (if applicable) in
such a way as to make
sure the assets are
preserved and
productive for current

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and future
beneficiaries.

Administering the trust
according to its terms ,
including distributing
trust assets to the
beneficiaries,
according to the trust
agreement.

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tools and techniques to which pension scheme trustees must now become familiar.

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Clare :

9780230244245

'This book is written with a mission not only to advance trustees' investment knowledge by demystifying the jargon and terminology that surrounds investment with its

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many and various nuances, but also to provide trustees with the necessary confidence and competence to adopt an advanced level of investment governance for their scheme.'

The Trustee Guide to Investment: Clare, A, Wagstaff, C ...

The Trustee has a duty of oversight over the activities of the Manager. The Manager

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operates the scheme. Any economic benefits to be gained from the AUT, such as dividends, are collected and distributed by the Trustee to the investors in the fund. An AUT is constituted by a Trust Deed, entered into by the Manager and the Trustee, who

**THE INVESTMENT
ASSOCIATION**

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MEMBER GUIDANCE

The investment strategy and the Trustees' overall funding objective are very closely linked. In order to determine an appropriate investment strategy, it is vital that the Trustees are clear on their funding strategy. Ideally therefore the Scheme Actuary should be involved in the decision making

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Choosing an
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consultancy? Under the
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are taken...

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the brain to think
bigger and faster can
be undergone by some
ways. Experiencing,
listening to the new
experience,
adventuring, studying,
training, and more
practical comings and
goings may incite you
to improve. But here, if
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plenty era to

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This power enables trustees to hold investments jointly or in common with other persons. Section 3 of the Trustee Act 2000 introduced the trustee general power of investment. The law recognises trustees to have the same investment powers as absolute owners;

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however trustees' are accountable to the beneficiaries.

Trustees powers of investment and delegation

Charity trustees are the people who share ultimate responsibility for governing a charity and directing how it is managed and run.

They may be called trustees, the board, the management committee

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