

BRISTOL AREA QUAKER MEETING (No 1175435)**POLICY ON INVESTMENTS** Revised: 11/5/18**Purpose**

This policy is to guide AM Trustees and the AM Treasurer when deciding on the investment of funds for which they are responsible, or when directing asset managers

The Investment Policy of the Trustees is:

1. To safeguard the best interests and concerns of the AM and the beneficiaries of individual trusts under Trustees' control;
2. To comply with all relevant legislation;
3. To ensure that the investments meet ethical and socially responsible criteria; using the criteria set out by the Trustees of Britain Yearly Meeting;
4. To maximise total returns within the limitations of low to medium risk;

5. To ensure that the Trustees' Asset Managers (Rathbone Greenbank) provide regular monitoring information;
6. To ensure that the entire income from each of the various Trusts' investments is applied according to the Purpose of each respective Trust.

Finance Committee is responsible for implementation of this policy, but refers all proposals for significant changes in our portfolio of investments for consideration by the Trustees

Comments or suggestions about this Policy should be forwarded to the Policy Owner.

Policy/Revision Agreed by;	Date / Minute
Finance Committee (Owner)	16/3/18
Trustees	11/5/18

Policy to be reviewed (Year): 2021