

Epworth is dedicated to serving the needs of churches and charities...

...through a Christian ethical investment approach.



## About Epworth

With roots dating back to 1960, Epworth is an investment manager dedicated to serving the needs of Churches and Charities.

We are stewards of our investors' money and carefully select investments using Christian ethical criteria.

Epworth manages assets of around £920m (31.03.2023) and is wholly owned by the Central Finance Board of the Methodist Church.

## Our investment approach

We believe our Christian ethical approach is unique. We start by asking what makes a good company, in every respect, and use Christian ethics as our guide.

We invest in sustainable companies and engage with their management to influence behaviour and ensure they are acting in a responsible way. Companies that do not meet our investors' ethical requirements will be excluded.

We take an active approach to investment management, believing this is the best way to add value for our investors. We help control risk by investing only in sustainable companies. Aware that fees can be a significant drag on returns over time, we look to keep our costs fair and competitive.

It is the combination of these factors that we believe provides the foundation to provide the good long term returns on which our investors depend.

We are committed to the UK Stewardship Code, Principles for Responsible Investment and the Montréal Pledge. We work closely with a number of organisations to improve ethical standards, most notably the Church Investors Group.

## Meeting your investment needs

We have a range of investment funds which offer simple solutions for charities.

You have two ways to invest in these funds. We can select the blend of our funds that best meets your needs (this is discretionary management and is subject to a minimum investment of £250,000).

Alternatively, you can simply choose the fund(s) that meet your requirements (the minimum investment in individual funds is £1,000).

## Cash management

Our Epworth Cash Plus Fund offers charities a competitive interest rate on their cash deposits, with same day access to their money.

## Multi-Asset

An all-in-one solution for charities looking for a good level of income and capital growth through a blend of different assets.

## Equities

Our UK and global equity funds are designed for charities looking for a good level of income and long term capital growth.

We also offer the Epworth Climate Stewardship Fund. This is an equity fund for charities looking to earn a good long term return whilst tackling the climate emergency.

## Cornerstone

Christian ethical approach

## Founded

1996. Parent company founded 1960

## Assets under management

£920m

## Our clients

We are privileged to manage money for a large variety of churches and charities. These range from some of the smallest charities to many household names.

We keep the needs of all charities in mind and reflect that in our approach, with access to our funds available from £1,000. Across the Group, we manage over 5,000 cash deposit accounts for churches and charities.

In short, our mission is to help charities in meeting their mission.



## Our senior team

We exist to serve the needs of Churches and Charities. We are passionate about what we do.

This focus allows us to attract people who are not only experts in their fields but are committed to the rewarding work they are undertaking on behalf of our investors.

Our Funds are managed by an experienced team, with a proven track record. So, if you are interested in good returns that faithfully meet your ethical requirements, we would be delighted to hear from you.

**Epworth Investment Management Limited**  
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Epworth Investment Management Limited ("Epworth") is authorised and regulated by the Financial Conduct Authority (FCA Registered Number 175451). It is incorporated in England and Wales (Registered Number 3052894), with a registered office at 9 Bonhill Street, London EC2A 4PE and is wholly owned by the Central Finance Board of the Methodist Church.

Epworth-managed funds are designed for long term investors. The value of units in funds can fall as well as rise and past performance is not a guide to future returns. The level of income is also variable and investing in Epworth funds will not be suitable for you if you cannot accept the possibility of capital losses or reduced income. Any estimates of future capital or income returns or details of past performance are for information purposes and are not to be relied on as a guide to future performance.

Please visit [www.epworthinvestment.co.uk](http://www.epworthinvestment.co.uk) for full details and terms of all our funds.

**David Palmer**  
*Chief Executive Officer*



In January 2017, David became Chief Executive Officer of the firm. He is a Director of Epworth, leads the Executive Committee and has ultimate responsibility for all aspects of the business.

**Roz Amos**  
*Chief Investment Strategist*



Roz joined us in June 2021 and is responsible for all matters relating to our investment functions. She has 25 years of investment experience. Prior to joining Epworth, she worked at UBS Asset Management.

**Vanessa Meredith**  
*Head of Compliance*



Vanessa joined the firm in September 2017 in the role of Compliance Officer. She has 23 years experience working in the financial services industry.

**Miles Askew**  
*Head of Research*



Miles has worked at the firm for over 20 years. He is Head of Research and has overall responsibility for identifying quality companies that fit our investment philosophy.

**Chris Field**  
*Head of Operations*



Chris is responsible for the day to day administration of our investment funds and is also Head of IT. Previously Chris worked at Citibank for 15 years in various investment operation positions.

**Rev Dr Andrew Harper**  
*Chief Responsibility Officer*



Andrew joined us in April 2021 and is responsible for all matters related to ethical thought leadership and ethical performance.

**Sarah Bourgein**  
*Head of Client Relations*



Sarah joined the firm in January 2022 as Head of Client Relations and is responsible for the management of client portfolios and providing investment advice.

**Simon Woolnough**  
*Head of Business Development*



Simon has over 33 years experience in Financial Services running Distribution Teams for large corporates (AXA), and start up companies. He is responsible for sales, marketing and communications.