

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

...we use an integrated Christian ethical approach to investment.



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 £1.3bn (30.09.2018) 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 positively 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, our management fee and overall costs are among the lowest in the industry.

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 Montreal 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 designed four investments funds which offer simple and low cost investment options for charities.

You have two ways to invest in these funds. We can provide discretionary management (subject to a minimum portfolio size of £250,000) where we will select the blend of our funds that best meets your needs.

Alternatively, you can simply choose the fund(s) that meet your requirements. All of our funds are designed to maximise their long-term total return.

Affirmative Equity Fund for Charities

An equity fund for charities looking for a good level of income and long term capital growth.

Affirmative Fixed Interest Fund for Charities

A diversified fixed-interest portfolio for charities looking for income with lower capital risk than investing in equities.

Affirmative Corporate Bond Fund for Charities

A portfolio of corporate bonds for charities looking for a good level of income with lower capital risk than investing in equities.

Affirmative Deposit Fund for Charities

Our Affirmative Deposit Fund provides a competitive rate of interest and a high level of capital security. It is an effective way for charities to maximise returns on their short-term cash surpluses, while retaining same-day access to their money.

Cornerstone

Christian ethical approach

Founded

1996. Parent company founded 1960

Assets under management

£1.3bn

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 investment funds available from as little as £1,000. Across the Group we offer a competitive rate of interest on over 7,000 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.

If you need any assistance please contact:

Mark O'Connor
Head of Business Development

020 7496 3639
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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.

Marina Phillips
Chief Financial Officer



Marina joined us in 2012. She is a Director of Epworth, a member of the Executive Committee and is responsible for the firm's overall financial controls.

Stephen Beer
Chief Investment Officer



Stephen joined the firm in 1994. He was appointed Chief Investment Officer in November 2015 and is a member of the Executive Committee. Stephen is responsible for investment strategy and overseeing our ethical investment approach.

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.

Christophe Borysiewicz
Head of Investment Management



Christophe joined us in January 2004. He manages client portfolios and is responsible for investment advice and all aspects of client relationships.

Vanessa Meredith
Compliance Officer



Vanessa joined the firm in September 2017 in the role of Compliance Officer. She has 20 years experience working in the financial services industry.

Matthew Richards
Senior Fund Manager



Matthew joined as Senior Fund Manager in January 2015 and has 18 years of investment experience. Matthew is responsible for global equities, including the selection and oversight of external Fund Managers.

Tendai Chigudu
Fund Manager



Tendai originally joined us in March 2005 and is now a Fund Manager. She is responsible for managing our equity fund and conducting research across companies in the UK.

Jane Kotchkina
Fund Manager



Jane joined us in April 2017 and is a Fund Manager looking after our range of fixed income funds. She previously worked for a number of investment management businesses including Citi Private Bank and Towry Ltd.

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Epworth Investment Management Limited (Epworth) is authorised and regulated by the Financial Conduct Authority. Incorporated in England and Wales. Registered number 3052894. Registered office 9 Bonhill Street, London EC2A 4PE.

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.