

Investment Policy of Rubinstein-Taybi Syndrome Support Group

UK Charity Registration Number: 1147765

Company limited by guarantee registered in England and Wales No. 7866190

Date of Investment Policy Statement: 11th February 2016

Introduction

Rubinstein-Taybi Syndrome Support Group (RTSUK) is an incorporated charity established by Trust Deed, which has charitable aims to support those affected by RTS.

RTSUK has approximately £xx,000 of assets, which are invested to provide an income for its activities. This represents the totality of the charitable assets and should be invested to grow at least in line with inflation to ensure sustainability. The trustees are governed by the Trustee Act 2000 which sets out the general power of investment. The Trust's assets are invested in savings accounts with CAF.

Investment Objectives

RTSUK seeks to produce the best financial return within an acceptable level of risk and with a mind to accessibility according to projects. RTSUK investment objective is to for capital growth in excess of inflation (RPI) and a stable, growing income stream.

Risk

RTSUK invests to mitigate long term inflation risk. Capital and income volatility can be tolerated if consistent with expectations. RTSUK assets are diversified in three accounts.

Liquidity Requirements

The Trust distributes funds between current and savings accounts.

Time Horizon

The Trust can adopt a long term investment time horizon, depending on activities planned.

Management, Reporting and Monitoring

RTS asset value and income is monitored quarterly by the Treasurer and reviews the investment performance of the savings accounts against peers and the investment objective on an annual basis.

Approval and Review

This Investment Policy Statement was prepared to provide a framework for the management of RTSUK investment assets will be reviewed periodically to ensure continuing appropriateness.