



## **Southwell & District Lions Club Charitable Trust**

### **Investment policy**

Trustees have an obligation to manage the assets of the charity to produce the best outcome for the charity. Where appropriate, this includes investing assets to deliver the best outcomes.

The investment policy of Southwell & District Lions Club Charitable Trust allows the investment of funds surplus to immediate needs to be placed with reputable organisations with the aim of maximising both capital growth and investment growth without taking undue or unnecessary risks. In practice this is limited to investment in interest-bearing accounts with reasonable access to the funds through a period of notice; recognising that this giving notice to withdraw funds may lead to loss of some interest.

**June 2018**