Volunteer Description

Investment Adviser

CONTEXT

Our strategy commits us to working on four focus themes to drive systemic change and help end slavery for everyone everywhere:

- Child slavery
- Responsible business
- Migration and trafficking
- Climate change and slavery

You can read more about us and how we work in the ‘About Us’ document on our recruitment webpage.

We are in the process of selling our freehold property and want to invest in the region of £500k-£800k in an appropriate mix of mid and long term investments to maintain the value of the fund and provide a source of income for the charity.

This role will be a key part of our governance structure providing independent direction and support to ASI as it seeks appropriate investments and the board in its scrutiny and oversight of investments and returns.

MAIN TASKS

- Review and advise on ASI’s draft investment policy, in particular its ethical criteria
- Support ASI in determining a suitable investment objectives, risk appetite and strategy, in particular whether we should use an investment management firm or invest directly in passive funds
- If we decide to use an investment management firm, lead the search for a suitable investment management firm and developing an appropriate tender document, noting the ethical criteria/ ESG requirements. Receive and review tenders or offerings from investment management firms and, together with management, support a recommendation to the Finance Committee
- If we decide to invest directly, lead the search for suitable investments and recommend a portfolio of investments to the Finance Committee, potentially with the support of an Independent Financial Adviser
- Consider appropriate processes and structure for monitoring our investments and agree this with management and the Finance Committee
- Lead and support a periodic review of our investment portfolio and its performance
PERSON SPECIFICATION

Essential

- Experience and knowledge of the UK investment market
- Understanding and knowledge about ethical investing
- No conflict of interest between advising Anti-Slavery International and their other professional interests. The postholder must not receive any commission or other compensation from any third party as a result of this role
- General experience of charity governance and boards
- Knowledge of investments by charities and its governance

TIME COMMITMENTS AND STRUCTURE

- The initial work in setting up the investments is likely to take perhaps 2-3 days per month for the first few months
- Once the investment management firm has been chosen and the investments placed, the ongoing work is likely to be minimal of perhaps 1-2 days per year
- Investments will be overseen directly by the Finance Committee, a subgroup of the board, which meets 3-4 times per year. The Finance Committee will review and agree key investments decisions
- The role would be overseen by the Treasurer of the Board, who is the Chair of the Finance Committee. Day-to-day contact will be with the Director of Finance & Resources and Chief Executive
- The role is unpaid but travel expenses for meetings would be paid
- It would be expected that the postholder would stay in the role for a minimum of 12 months
- The role would not be that of a trustee, with the accompanying governance requirements, however if the postholder were interested in becoming a trustee, the board may be open this becoming a trustee role in the future

How to apply

If you wish to apply for this position, please email a CV to jobs@antislavery.org using the reference Volunteer Investment Adviser in the subject line.

If you would like an informal chat about the role, please email the Director of Finance & Resources, a.gray@antislavery.org, to arrange a time and date to talk.