

**CHARITY:** CoL Combined Education Charity (Charity no: 312836) AND City Educational Trust Fund (Charity no: 290480)

**SURVEY QUESTIONS FOR CHARITIES INVESTED IN THE CITY OF LONDON CHARITIES POOL**

The City of London Charities Pool (the Pool) offers small charities linked with the City of London the opportunity to obtain better returns than could generally be achieved if investments were made individually, thus enabling the charities to maximise their activities for the public benefit.

The aim for the Pool is to maximise revenue returns and capital growth by “pooling” these small charitable investments. In so doing, the Pool provides incoming resources to enable these charities to pursue their respective objectives.

The investments are currently managed with the aim of generating a rising income stream combined with long term growth.

The City of London is seeking to establish the expectations of charities investing in the Pool, taking into consideration the long term income objective as stated above.

1. Please rank the following factors in order of importance to your charity and its investment in the Pool on a scale of 1-3 with 1 = most important.

Relatively consistent income/dividend return

Income/dividend growth

Preservation of Capital Investment

2. The performance of the portfolio is likely to be subject to short term volatility. Any investment should be judged from a long term perspective. Does this strategy meet with your requirements from the Pool?

Yes

No

If no please comment further in the box below

3. Fund performance information is included in the Charities Pool Annual Accounts. What additional information would you like to receive?

COMPLETED BY:..... DATE:.....