

The Launch of Whitechurch Ethical



Amanda Tovey
Investment Manager

Whitechurch is pleased to announce the launch, on 1st March 2016, of Whitechurch Ethical – our offering of ethical investment services.

Whilst the concept of ethical investing has been around for many years, we have recently begun to see a notable increase in interest from clients seeking ethical solutions which would allow them to reflect their values in their investments.

Whitechurch Ethical Investment Solutions

Our ethical portfolios are all discretionary managed multi asset portfolios which utilise the Whitechurch Investment team's expertise in asset allocation.

We will offer a range of model based ethical portfolios available for investments of £3,000 upwards through to a more bespoke service for higher net worth clients.

The portfolios will be managed by the Whitechurch Investment team with Amanda Tovey as lead Investment Manager. Amanda has a wide breadth of experience in the Finance and Investment sectors, and is Head of Direct Equity at Whitechurch. She is also personally dedicated to sustainable and ethical practices. In leading this launch, she said;

"I am very excited that we are moving into the ethical space as I feel this is a growing market. Ethical investing is a key consideration for many people I have spoken to and with increasing need for Governments and companies to act in a more responsible manner on a range of issues from tax payments to climate change we as investors need to play our part and engage with this."

"We have teamed up with Ethical Screening and established key criteria in which to screen funds and direct equities for inclusion into our ethical portfolios. The exclusion criteria includes fundamental areas of concern such as non-medical animal testing, gambling, arms production, tobacco, pornography, to name a few."*

"We are pleased to provide a growing service for our clients that complements our existing suite of discretionary managed services."

Matthew Ayres, Client Relationship Manager at Ethical Screening commented "we are delighted to be working alongside Whitechurch to develop their responsible investment proposition both on the model portfolio side, via our Ethical Fund Database, and with bespoke screening of direct equities. This new relationship furthers one of our key aims: to further the incorporation of ethical and corporate responsibility issues into the investment analysis and decision-making process."

*Ethical Screening:

The screening of direct equities and information on ethical funds will be provided by Ethical Screening, a company dedicated to enabling the management of money according to investors' ethical values (www.ethicalscreening.co.uk).

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Whitechurch Investment Team, February 2016

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