

CharityFinance
**INVESTMENT
FORUM & DINNER**
WINTER EDITION

INVITATION

Starts 5pm 4 Dec 2023 | Ends 3pm 5 Dec 2023

The Lensbury

RSVP OVERLEAF

Your invitation to the Winter Charity Investment Forum



We are delighted to offer you a complimentary place at the **22nd annual Charity Investment Forum and Dinner**, hosted by Charity Finance.

The Winter 2023 Charity Investment Forum returns to The Lensbury in Middlesex. The pre-forum reception and dinner provides the perfect setting in which to network with colleagues from other charities. This is complemented by a full day's programme of 16 expert sessions giving insight and analysis into a range of investment strategies and crucial investment topics.

As with previous years, we have incorporated your feedback into designing a thought-provoking and educational learning programme. You will be able to select the most appropriate sessions for your personal needs and objectives, providing a rare and highly time-efficient opportunity to compare and contrast different investment approaches and styles in a peer-supported and non-pressured environment.

Thanks to the support of sponsors, your place will be complimentary. It includes the pre-forum drinks reception and dinner on 4 December, accommodation for that night, and entry to the seminar sessions on 5 March.

Please RSVP via email at events@civilsociety.co.uk to secure your place. You can find out more information at www.civilsociety.co.uk/WinterCIF.

Tristan Blythe

Editor, *Charity Finance*

Topics include:

- Generating returns for charity investors
- Sustainable investing
- Multi-asset strategies
- Selecting the right investment manager
- Investing in an inflationary environment
- Risks and opportunities
- ESG and responsible investment

Professor Trevor Williams,

Economist, visiting professor, lecturer and writer



Trevor Williams is an economist who previously served as Chief Economist at Lloyds Bank for over a decade. From energy and climate to how companies use data, he analyses the key trends and policies that shape markets and brings clarity and cutting edge thinking to the economic overviews.

Prior to his time at Lloyds, Trevor worked for the civil service before going on to work as an economist in the City for over thirty years. He covered specialities including equity and foreign exchange, forecasting and financial analysis. Since, he rotates as the Chair of the Institute of Economic Affairs' Shadow Monetary Policy Committee where he keeps a close eye on the Bank of England's decisions and direction of travel. He considers the impact of

interest rates, monetary policy and quantitative easing and translates them into useful intelligence businesses can use to inform strategy. He also reveals how companies can use their own big data sets to reveal insights into their place within the wider economy.

Trevor writes regularly on financial and market matters, including a regular column in the personal finance magazine Moneyfacts. He is the co-author of Trading Economics, a clear guide to the statistics and indicators that underpin market economics and is a Professor at St Mary's University, London and a Visiting Professor at the University of Derby.

This talk will offer an objective exploration of an economic recovery's nature, likelihood, and timeframe. From pandemics and Brexit to new technologies and business models, Trevor will consider the threats and opportunities in the immediate term and how to respond. He will look at the risks for business and the challenges for policymakers. Are we in for a new 'Roaring 20s' or a global depression, or something in between characterised by a previously unseen combination of employment figures, inflation and interest rates?

Daniel Hulme,

CEO and expert in Artificial Intelligence



Daniel Hulme is the CEO of award-winning AI solutions company Satalia, Chief AI Officer for WPP, and Director of University College London's Business Analytics Masters degree.

He looks at how AI and emerging technologies, such as the metaverse, can solve the most challenging problems and deals with its business, ethical and social implications, as well as wider technological and economic developments. Passionate about creating a positive technological future, Daniel sees his mission as making AI accessible and understandable whilst also providing a framework for avoiding the potential pitfalls. He works at the intersection of technology, innovation, organisation and ethics.

After studying computer and cognitive science, as well as management and computational complexity, and gaining a doctorate in AI, Daniel has since balanced work in both academia, public and private sectors. He's worked as a consultant for a range of technology companies in the UK and US. He's served on and founded advisory bodies and steering groups largely focused on the economic, employment and ethical implications of technology, data and AI. He's advised the UK Government on data use and worked with groups to foster entrepreneurship, learning and innovation in the private sector. He's also contributed to numerous books, articles and podcasts on AI and the future of work.

Daniel also founded and now leads Satalia. Seen by many as a peer of Google's DeepMind, they apply AI to solving difficult business and social problems. They seek out practical applications of AI, often in unexpected ways, dealing with areas beyond customer and market data or automation. Following Satalia's acquisition by WPP, Dan is now also Chief AI Officer across the WPP Group, looking at the safe and ethical use of AI across WPP, its clients, and wider society.

This session will focus on the reality and the risks of artificial intelligence, busting common myths and offering plenty of time for Q&A.

THE VENUE



The Lensbury

Broom Road, Teddington, TW11 9NU

The 2023 Winter Charity Investment Forum & Dinner will be held at The Lensbury in Teddington. The venue is set in 25 acres of beautiful landscaped grounds on the banks of the River Thames.

— CHARITIES ATTENDING THE PREVIOUS FORUM —

ABF The Soldiers' Charity	Honourable Artillery Company	Queen's Nursing Institute
Architects Benevolent Society	Impetus - The Private Equity Foundation	Redwings Horse Sanctuary
Baptist Union of Great Britain	Institute of Marine Engineering, Science & Technology	RNLI
BFWG Charitable Foundation	Institute of Physics	Rowland Hill Memorial & Benevolent Fund
BLESMA	International Glaucoma Association	Royal Agricultural Benevolent Institution
Bridge House Estates	International Society of Ultrasound in Obstetrics & Gynaecology	Royal Artillery Charitable Fund
Brooke	John Lyon's Charity	Royal Astronomical Society
Buttle UK	Land Trust	Royal Brompton & Harefield Hospitals Charity
CABA (Chartered Accountants' Benevolent Association)	Leeds Castle Foundation	Royal Entomological Society
Carnegie UK/Alex Ferry Foundation	Leeds Hospitals Charity	Royal Literary Fund
Cats Protection	Lichfield Diocesan Board of Finance	Royal Naval Benevolent Trust
Christ's Hospital	Linbury Trust	Royal Trinity Hospice
Church Burgesses Trust	Lionheart	RSPCA
Clergy Support Trust	London's Air Ambulance	Salesian Sisters of St John Bosco
Clifton Diocese	Market Harborough & The Bowdens Charity	SBA The Solicitors' Charity
Clifton Suspension Bridge Trust	Mission to Seafarers	School of Economic Science
Cripplegate Foundation	Monday Charitable Trust	Scope
Daughters of Jesus	Muscular Dystrophy UK	Smallwood Trust
Diocese of Canterbury	Needham Research Institute	St John's Foundation
Dominican Sisters	Nene Park Trust	St Mary Redcliffe Church
Congregation of Saint Catherine of Siena Newcastle Natal	Norwich Consolidated Charities	St Saviour's Medical Charity
Donkey Sanctuary	Okehampton United Charity	Stewardship
D'Oyly Carte Charitable Trust	Papworth Trust	Support our Paras
East Malling Trust	Parkinson's UK	Triangle Trust 1949 Fund
East of England Agricultural Society	Parks Trust	Trinity College Oxford
Estate Charity of William Hatcliffe	Peel Institute	United Reformed Church (West Midlands) Trust
Faculty of Sexual and Reproductive Healthcare	Performing Rights Society Members' Fund	Winchester Diocesan Board of Finance
Fishermen's Mission	Primary Science Teaching Trust	Wolfson College Oxford
Hampshire and Isle of Wight Air Ambulance		

RSVP

Please email this form, or the information requested, to events@civilsociety.co.uk

Yes, I'd like to attend / nominate a colleague Sorry, I can't attend

Sponsors of the Charity Investment Forum would like to contact attendees directly after the event. Please tick the box below if you are happy for us to pass on the contact details you use to register the event.

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I understand that by booking this place you will be reserving a hotel bedroom for me and incurring additional hospitality costs throughout the event. In the event that illness or other personal circumstances prevent me attending, I will do my best to provide an appropriate substitute in order that my place is not wasted.

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