

Notes from the trustees of organisations working group

- 1) We need information on impact investments as we rarely have the resources to find them ourselves
- 2) We do not tend to have the time or resource to serve on boards of impact investments/ read shareholder reports properly with due diligence/ spend time talking with other investors – therefore we need help to be able to be duly diligent. It is so much easier with equity investments in large scale business. We need help so that, say, 10% of our investments do not take up 90% of our time.
- 3). We need simple information such as success stories of impact investments by trusts of our scales. We need these also to show learnings that we could benefit from.
- 4) We need liquidity – the ability to get out of impact investments, to sell them on and to cash in as we can with other investments. Maybe we need pooled impact investment funds therefore.
- 5). We recognise that private investors have the possibility of tax benefits that our trusts don't have. Because most of us are grassroots organisations we can, even if we cannot make impact investments, encourage our grassroots to do so.