



Livery Charity Chairs Group

sharing and learning

All Livery Charity Chairs (or their nominees) are invited to our workshop:

Hot Topic #6 – Charity Investment Issues

to be held on Zoom from 16:00 - 17:00 on Monday March 6th 2023

The session will begin with two brief presentations which will be followed by discussions in breakout rooms and a plenary wrap up session. **To register and receive your personal details to join the Zoom Meeting please contact Hilary Lindsay (almoner@accountantslivery.org).**

Most well-established Livery Charities will have funds which will have grown over the years, due to the generosity of their members and effective stewardship of those funds. The income arising from those funds may well be an important element in deciding how much a charity may be able to give to deserving causes in any year. While every Livery Charity's circumstances will be different, all will need to have considered how those funds are invested, who takes care of those funds, what policies are in place covering those arrangements and how does the charity ensure an effective relationship between itself and those managing the funds. Steve Graham from the Glaziers and Stephen Gilbert from the Chartered Secretaries and Administrators will both share how these matters are considered within their charities in order to prompt further discussion on these matters.

Glaziers' Foundation and Charitable Trust



Steve Graham is a Past Master of the Worshipful Company of Glaziers, a Trustee and Chairman of the Glaziers' Foundation and the Glaziers' Trust. Steve was for many years the Senior Clerk of Landmark Chambers and was tempted out of retirement in 2010 to become a Director and now International Business Consultant for Outer Temple Chambers. He is a past Chairman of the Institute of Barristers' Clerks and is a Trustee and Chairman of the Barristers' Clerks Benevolent Fund. Steve is a Trustee of Southwark Charities, Chairman of the Board of Governors of the Wyvern Federation of Schools and a Governor of the Gipsy Hill Federation of Schools.

Chartered Secretaries and Administrators' Charitable Trust

Stephen Gilbert is the current Chair of the WCCSA Charitable Trust and a Trustee of the Ellison-Cliffe Charitable Trust. Stephen is a Chartered Secretary who has specialized in Charities for over 30 years. As well as fulfilling a number of Trustee and Chairing roles Stephen was the Chief Executive of The Printing Charity for 13 years until he retired in 2016. Over his time Stephen has overseen and worked with investment managers on the investment and monitoring for funds ranging between £1 million and £30 million.



Future dates for your diary

11:00 on Thursday 20th April 2023 on Zoom, Informal drop in session for LCCG Members
For any queries, please contact LCCG Convenor Hilary Lindsay (almoner@accountantslivery.org).