

## Autism East Midlands

### Investment Policy

#### Introduction

Autism East Midlands aims to improve the lives of autistic people and their families. We do this by providing high quality services that enable autistic people to achieve their goals.

We promote understanding and awareness of autism and seek to provide a breadth of opportunities that support autistic people to thrive.

Any investments that AEM make **must** support this agenda.

#### Our Approach

Autism East Midlands will primarily utilise any available funds over and above its agreed levels of reserve to invest in existing and new services that support it to meet its charitable aims.

By doing so we achieve the double return of investment of improving the lives of autistic people and generating sustainable surpluses that enable us to continue this work.

Investments may be in physical infrastructure, staff development or technology. Decisions regarding capital expenditure above £30,000 are reserved to Trustees and the level of re investment is agreed annually by Trustees in setting the Capital Expenditure Budget.

These decisions take in the following factors:

- Priorities for improvements to existing services
- New developments in best practice
- Advances in technology
- Opportunities to develop new services and benefit more autistic people.

## Investing Reserves

It is important that the minimum agreed level of reserves are accessible at short notice as their purpose is to provide a safety net for unexpected activity.

To that end minimum reserves will be held in instant access accounts. Where possible these will be interest generating accounts.

At times when we are holding above the minimum level of reserves and have not designated funds for investment in services, we will seek medium term investments that generate a higher level of return.

As a charity it is important that we understand where investments will sit and maintain an ethical approach to investing. Not to do so could severely damage our standing. This will limit the range of products available but is nevertheless important.

All medium term investments will be agreed by the Audit and Finance Committee.

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