



Charitable Incorporated Organisation

Registered charity number: 1207878

Cymar Investment Sub group

This Committee is a subgroup of the Cymar Finance Committee and reports to them by Minute, and at meetings.

It will meet at least twice annually, and more often when needed.

The Committee will be formed of 1 representative from each Area Meeting & CCQW plus the Cymar treasurer.

The Committee will have the power to co-opt if required.

The Committee will appoint the clerk from among its members.

Cymar will follow the BYM Investment Policy: [BYM Investment Policy 2021](#) (listed under Documents).

Initially this sub group will:

Recommend as soon as possible moving money from instant deposit accounts to higher interest accounts;

Review the BYM Investment Policy for Cymar's purposes;

Draft a specification for potential Investment Managers;

Suggest the amount to be moved from Cymar bank accounts into an Investment Portfolio, giving thought to what proportion needs to be accessed in the short, medium & long term;

Meet at least 3 Investment Managers with a view to recommending one to hold some of the reserves held by Cymar;

Recommend an Investment Manager to Trustees;

Manage the transfer of funds from bank accounts to investment manager.

Once established the committee will:

Review reports from the Investment Manager twice annually;

Meet the Investment Manager annually to review financial performance and ethical criteria;

Report to finance committee annually, and more often when needed.

Check periodically to see whether the BYM Investment Policy has been updated, and ensure it is still in line with Cymar's wishes.

Review the Fund's performance every 5 years and decide whether to remain with the same investment manager or carry out a search for a new investment manager.



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Relationship with MBS

The Committee will take advice from MBS on levels of money held in various accounts and be ready to act when money needs to be added or withdrawn from the investment portfolio.

Advice

The committee may ask Finance Committee for funds to contract an Investment Advisor if required in the future.

The Cymar Finance Committee may request advice on Investments from the investment sub committee.

Agreed by Cymar trustees on (date): 14th August 2025

To be reviewed after three years, or sooner if required