

## Roundtable: Dublin

### Managing Resources & Assets in a Low Yield Environment

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<b>Date</b>	Tuesday 23 February 2016
<b>Time</b>	16:00 registration for 16:30-18:00, followed by networking reception
<b>Venue</b>	AIB Bankcentre, Ballsbridge, Dublin 4 (Serpentine Avenue entrance)
<b>Chair</b>	Maura Moore, AIB Sector Head, Non-profits & Professional Services
<b>Panel</b>	Ian Moynihan, Investment Consulting, PWC; David Haslam, Head of Retail, Irish Life <b>Investment Managers</b>

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Managing resources and assets in the Non-profit sector has become increasingly challenging given the persistent low yield environment and the increase in market volatility since last summer. Despite the swings in asset values, investment returns are a core source of ongoing funding and long term financial sustainability for many organisations.

At this event we will evaluate how markets have evolved in the last number of years, and consider the future outlook. We will focus on and discuss the experience and challenges faced by the Non-profit sector in setting and monitoring an investment strategy and illustrate by way of case study. Finally, we will look at some of the governance tools available to Non-profit organisations to formalise their objectives, fit an investment strategy around them, and identify some key principles of good decision making.

Questions to be addressed:

- How can a low yield environment be handled by investors and charities?
- How do charities and investors set investment strategy – and how do they evaluate whether or not it is succeeding?
- How can we address the difficult decision between reducing the expected return and increasing the investment risk being taken on?

#### Register by email or online before 19 February

Early booking recommended.

**Target audience for the event is representatives from charitable organisations and professional services firms, and those who sit on Boards or Audit Committees in the Non-profit sector.**

RSVP by email: [registration@philanthropy-impact.org](mailto:registration@philanthropy-impact.org)

#### About Philanthropy Impact

Our vision is to increase philanthropy and social investment across borders, sectors and causes.

Our mission is to achieve greater sector knowledge and expertise. Through our links with key sector stakeholders we develop thought-leadership on philanthropy and social investment.

We do this by delivering activities that include:

- Events: a comprehensive programme of events that support professional training and development
- Publications and Research: our 'body of knowledge' guides, case studies and the acclaimed Philanthropy Impact Magazine
- Advocacy: we advocate for policies and regulations that encourage philanthropic giving and social investment

*Philanthropy Impact would like to thank AIB for generously hosting this roundtable*

