

The Trustee Guide To Investment

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for trustees and their financial advisers when considering the investment strategy of a trust. These include: • the financial objectives of the trust • the tax status of the trust and its beneficiaries • the permissible investments available to the trustees • the legal requirements of the trust provisions. Each area needs to be considered in

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The Trustee Guide to Investment

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ESG & Stewardship: A practical guide to trustee duties Recent changes to the Occupational Pension Schemes (Investment) Regulations 2005 mean it is now vital that trustees of all schemes understand and include ESG factors and stewardship approaches in their investment decision-making.