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Investment Policy

This policy should be considered alongside and in conjunction with Halcyon's Reserves Policy, Risk Management Policy, Finance Manual and Halcyon Articles of Association

Trustees can invest money to provide income for Halcyon London International School ("Halcyon") or as a way to meet its aims.

When making investments, Trustees must:

- follow any rules set out in Halcyon's governing document
- take expert advice where necessary
- have a mix of investments which will minimise any risk
- explain the investment policy in the Trustees' annual report.

The Trustees need to have control of the charity's investments and monitor their performance. Any advice taken on investments needs to be impartial.

The Trustees deem that investments can only include highly rated, secure and liquid assets. All investment transactions must be conducted with financially regulated and reputable counterparties.

As the regulator of charities in England and Wales, the Charity Commission has produced guidance to support charities and their Trustees in confidently making decisions about investments that comply with their duties.

Halcyon Trustees are required to refer to the Charity Commission publication *Charities and Investment Matters: A Guide for Trustees, August 2023* ([CC14](#)) before making decisions about investment.

Approved by Board of Trustees, 17 September 2019.

Approved by Board of Trustees, 18 November 2021.

Reviewed and approved by the Board of Trustees, 26 September 2023

This policy will be reviewed in accordance with the curriculum review cycle, or more regularly in light of any significant changes in statutory requirements and legislation.