

Investment Committee member role description

Job Title:	caba Investment Committee member
Responsible to:	Investment Committee Chair
Responsible for:	<p>Furthering the committee's work and the work of caba generally, within its charitable objectives. The members of the committee are collectively responsible for the activity and actions of the committee. A co-optee will share fully in the work and decision making of the committee.</p> <p>Main tasks as part of the committee</p> <ul style="list-style-type: none"> To review investment performance and asset allocation, contributing to discussions during meetings and by email where appropriate. To be responsible for investment decisions. To ensure that the policies and practices of the committee are in keeping with its stated aims and are within its delegated authority as stated in the committee's terms of reference. To ensure that the committee functions within the legal and financial requirements of a charitable organisation and that it strives to achieve best practice. To periodically review caba's investment policy and the performance and selection of advisors.
General:	caba is a charity that helps the ICAEW community thrive through everyday situations to exceptional life-changing circumstances, whether they're at the start of their career or beyond it, developing it or changing it; whether they want guidance on what to do next, practical skills for life, or advice on wellbeing.
Main Duties:	<p>Investment performance</p> <ol style="list-style-type: none"> Review performance of portfolio and individual funds as detailed in quarterly performance reports prepared by advisors, along with their recommendations for action. Review and contribute to discussions on asset allocation, risk appetite and portfolio recommendations, making proposals for the way forward and being actively involved in decision making. Contribute to discussions on investment strategy, ensuring that it is delivered and relevant in current market conditions. Meet and interview fund managers, challenging their performance as appropriate and ensuring that their processes are robust. <p>Ensuring best practice</p> <ol style="list-style-type: none"> Be an active committee member, aiding IC in exercising its responsibilities and functions, in accordance with the terms of reference of IC. Maintain good relations with colleagues, management and other stakeholders. Keep up to date in investment matters, which may include attending investment conferences or training courses. Fulfil such other assignments as may be required by IC or caba.