

## Charities adopt new wealth management fundraising channel Over £53,000 raised so far

**16 April 2018, London** – [The Archway Project](#), [Bobath Scotland](#), [HEART UK - The Cholesterol Charity](#) and [Willow Foundation](#), have each partnered with a new non-advised investment platform providing members with access to expertly managed discretionary investment portfolios, whilst also giving them the opportunity to benefit their chosen charity/ies in the process.

The service is delivered via [Greenfinch](#), a white label wealth management platform enabling charity members to invest in a range of mainstream and ethical portfolios, either directly via a general investment account (GIA) or via an individual savings account (ISA). Each portfolio and product is part of the patented 'You Give We Give' (YGWG) donation scheme, which presents socially responsible investors with the opportunity to donate a percentage of their annual profits to a charity of their choice. Investors are also given the opportunity to make an initial donation upon opening their accounts.

The investment management company behind Greenfinch, TAM Asset Management, matches the donation with an equal percentage from their annual fee, and manages the portfolios and products.

Charlotte Hoare, Fundraising Manager, HEART UK says: "It's a brilliant idea and lets investors choose what profit percentage they would like to donate to their chosen charity. We're always looking to expand our fundraising channels, and this is a great new area for us."

"The rise of online wealth management pioneered by companies like Nutmeg has opened up the market to a new generation of investors. However, unlike Nutmeg, our service is 100 percent non-advised, which means there's minimal regulatory risk. YGWG is a totally unique way for charities to engage with their supporters and raise funds", says Lester Petch, CEO of TAM Asset Management.

He adds: "It allows investors to combine their environmental and social considerations with strategies designed to deliver long-term capital growth. We are confident that this approach will provide ethically minded investors with the investment solutions they have been looking for, while also opening up fruitful new fundraising opportunities for our charity partners."

### **Additional quotes:**

John Milton, CEO, The Archway Project: "For Archway, the choice was straightforward. We had the opportunity of being associated with an award-winning product, with the possibility of receiving additional funding. Funding that would allow us to help more disadvantaged young people."

Virginia Anderson, Head of Fundraising, Bobath Scotland: "Customers really can change the lives of children with cerebral palsy, with Greenfinch adding to every donation you give from your returns. Simply select your charity and let your investment do the rest."

Caz Eagles, Major Partnerships Manager, Willow Foundation: "Every day we see young adults who are experiencing the devastating impact that diagnosis, treatment and recovery from a serious illness can bring, at a time in your life that should really be all about living life fully. Our aim is to focus all our energies and efforts in helping to rectify this, by creating unique and unforgettable Special Days for the creation of memories to treasure. We are delighted to be working with Greenfinch to raise much-needed funds to deliver these beliefs."

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**For more information and/or interview opportunities please contact:**

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**About TAM Asset Management:**

TAM is an award-winning specialist in discretionary investment management and can trace its company roots back to the 1930s. Today, TAM is majority owned by its management team who are committed to preserving the values of transparency and honesty to client services, which has allowed TAM to build its reputation as a forward-thinking provider of pioneering investment solutions.

TAM manages assets for: private clients, insurance companies, pension schemes, trust companies, charities and other financial institutions, utilising the next generation of interactive portfolio management systems to present a unique investment offering. From its head office in London and international office in Mauritius, TAM offers the flexibility of both onshore and offshore investment management.

For more information [click here](#).

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