

SARASIN
& PARTNERS

A WORLD WITH OPPORTUNITY

Spring Seminars 2023

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INTRODUCTION



MELANIE ROBERTS

Growth in charity assets (£ billion)

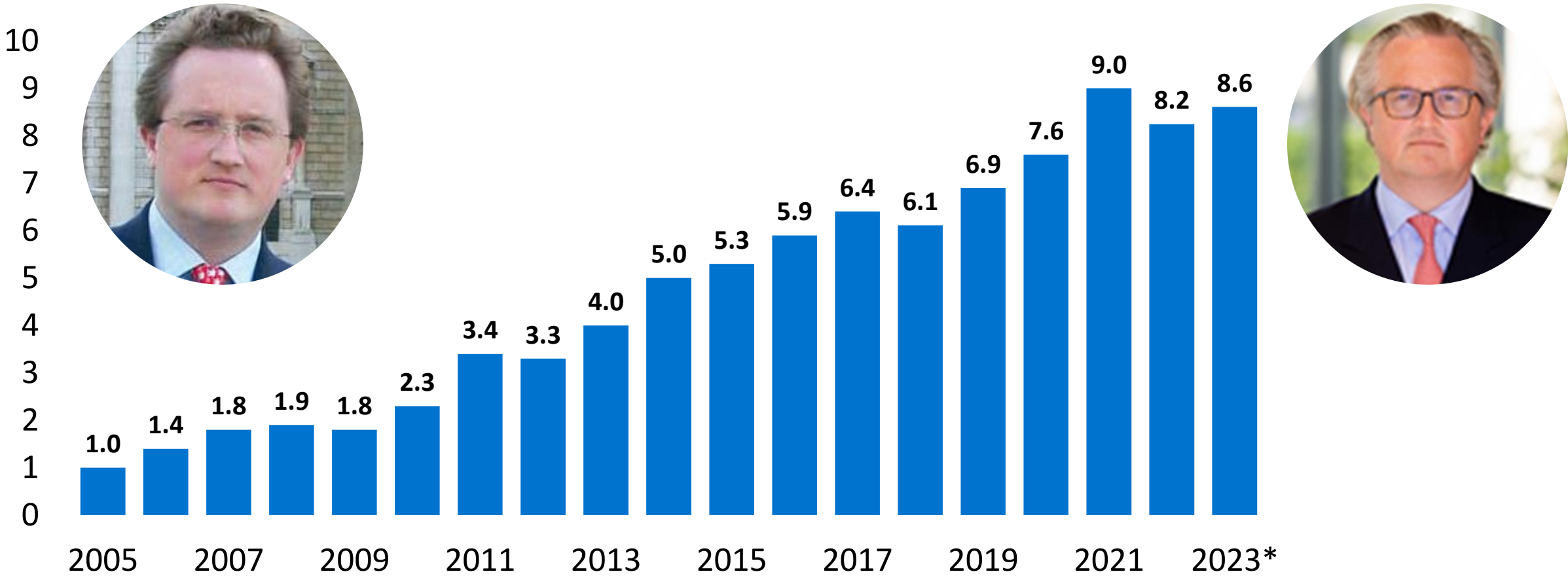
Assets under management £



Source: Sarasin & Partners LLP, *data to 31.01.23

Growth in charity assets (£ billion)

Assets under management £



Source: Sarasin & Partners LLP, *data to 31.01.23

Charities team



Melanie Roberts
(27/11)
Partner, Head of Charities



Richard Maitland
(30/29)
Senior Partner



Oliver Bates
(33/14)
Partner



Ruadhri Duncan
(27/11)
Partner



James Hutton
(19/10)
Partner



Alexander True
(17/8)
Business Partner



Tania McLuckie
(15/5)
Senior Associate Partner



John Handford
(11/11)
Head of Charities Marketing



Thomas Lindsey
(9/5)
Senior Associate Partner



Katherine Hussein
(8/2)
Senior Investment Manager



Kamran Miah
(6/3)
Senior Investment Manager



Helena Wakefield
(4/2)
Investment Manager



Mashrufa Miah
(4/1)
Assistant Investment Manager



Bede Gallagher
(2/1)
Assistant Investment Manager



Octavia Thomson
(1/1)
Assistant Investment Manager



Sean McCaffrey
(30/1)
Senior VP, USA



Ian Craik
(39/2)
Senior VP, Canada

Private client team



Jamie Black
(35 years)
1996*



Edward Campbell-Johnston
(29 years) 1996*



Randal Dunluce
(31 years)
1997*



Lucinda Harris
(37 years)
2003*



Mark Fairbanks Smith
(37 years)
2007*



Sam Jeffries
(28 years)
2007*



Tom Vernon
(15 years)
2006*



Graeme Bruce
(14 years)
2013*



Henrietta Carthew
(2 years)
2020*



James Fishbourne
(21 years)
2004*



Georgie Flowers
(1 year)
2021*



Ben Gilbert
(12 years)
2019*



Duncan Gordon
(22 years)
2012*



Marcus Hill
(5 year)
2021*



Anastasia Jennings
(2 years)
2020*



James Kelway-Bamber
(6 years) 2017*



Harveer Mata
(10 years)
2021*



Kerina Meadows
(4 years)
2021*



Henry Merrick
(3 years)
2019*



Allanah Hill
(4 years)
2018*



Stephen Rothwell
(26 years)
2019*



Sophie Spencer
2012*



Andrew Stewart
(41 years)
2007*



Alexander Swan
(2 years)
2020*



Andrew Taylor
(4 years)
2018*



Henrietta Walker
(28 years)
2019*



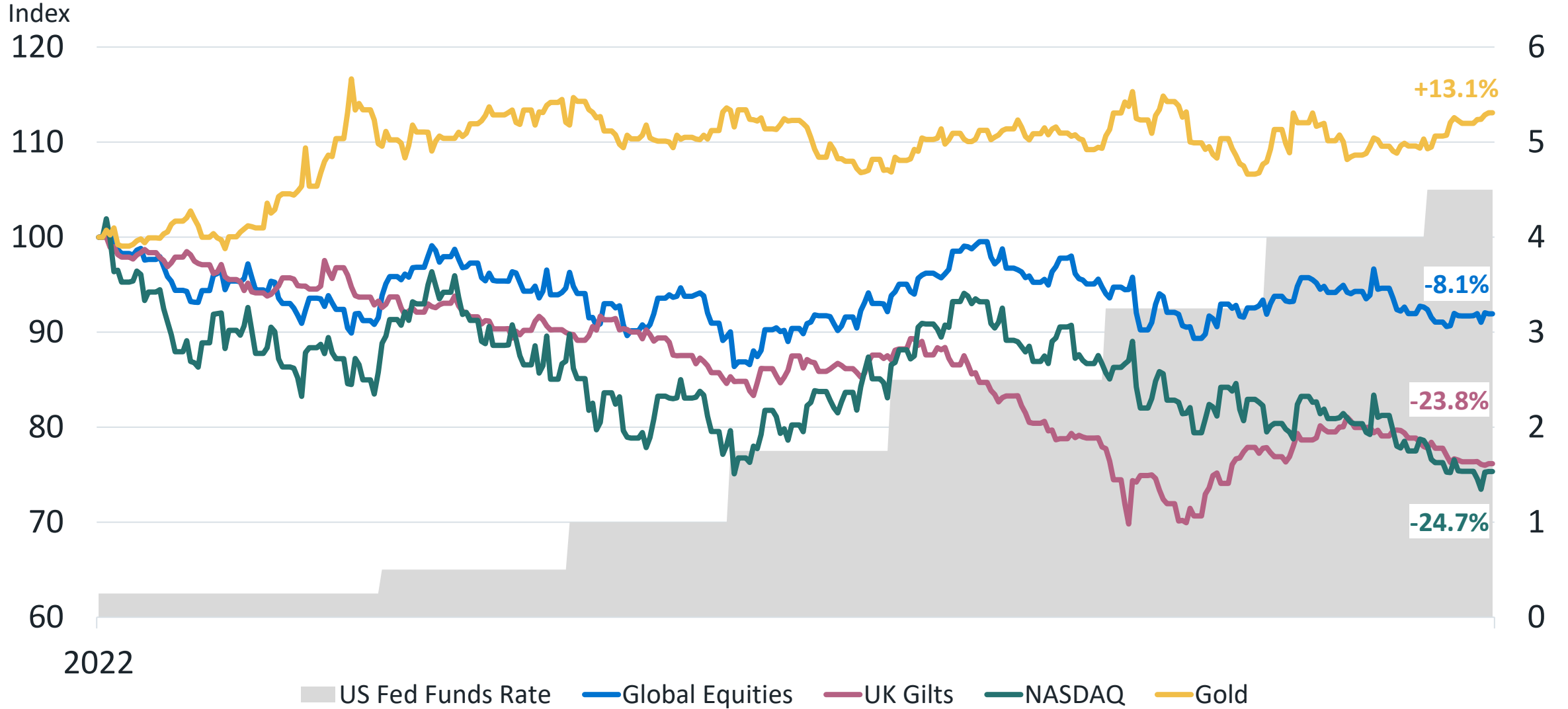
Nick Wood
(24 years)
1998*



Phoebe Woods
(4 years)
2021*

2022

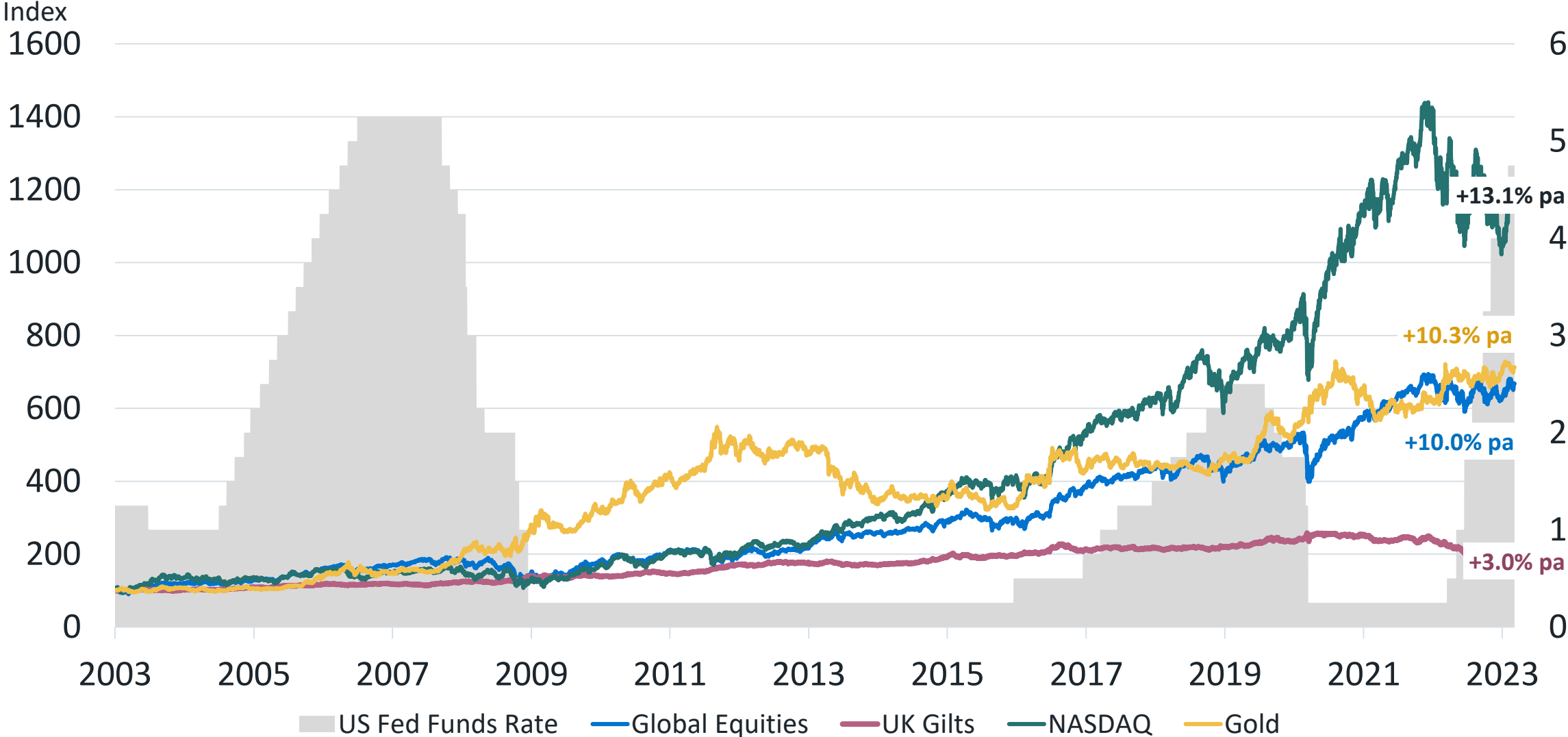
Major asset class returns (£)



Source: Macrobond, March 2023. **Past performance is not a guide to future returns and may not be repeated.**

The last 20 years

Major asset class returns (£)



Source: Macrobond, March 2023. **Past performance is not a guide to future returns and may not be repeated.**

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