



THE THOUGHTFUL INVESTOR

Castlefield INSIGHTS



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SPRING, THE SEASON OF HOPE AND POSSIBILITY



I knew it was spring, when I noticed the blossom outside my window had exploded into action. Yes, longer, warmer days are just around the corner.

Talking about climate, in this edition of Insights we do a follow-up to the UN Climate Conference with David Gorman reviewing COP28 to see if the outcomes met with our pre-event expectations. You'll also find a piece about our engagement with investee firms where we encourage them to disclose their environmental impact data. We're also delighted to share news of a few successes at Castlefield too. Not only have we been shortlisted as

finalists for two separate industry awards, but we've achieved Chartered status from the CISI. We're also proud to share news of our chosen charity for this year plus a new report about the diversity of co-owners at Castlefield.

There are a few other regular items you'll find in this edition too including our In The News round-up, along with an update on charity fundraising over the last twelve months.

We're really keen to hear your feedback about the marketing communications you receive from us (such as our newsletters, videos etc.). Please let us know your views

by completing a short survey. It won't take more than five minutes and you can complete the questions anonymously.

As 'Anne of Green Gables' author, L.M Montgomery, once said: "Nothing ever seems impossible in spring, you know." Spring certainly feels like the season of hope and possibility possibility, and we hope you are looking forward to the rest of 2024 as much as we are.



Nathan Cameron,
Marketing Manager

CASTLEFIELD NEWS

Throughout Autumn 2023, Castlefield Co-owners have frequently been approached to feature within industry publications and provide comment to the press. This latest 'In the news' feature provides a summary of some recent interviews, opinion pieces and press coverage we've featured in over Autumn and Winter 2023, with links to the original articles.

<https://www.castlefield.com/home/media/news/castlefield-in-the-news-winter-2023/>



2023 YEAR IN REVIEW

Throughout 2023, Castlefield Co-owners published a range of blog articles, reports, research and opinion pieces. We've hand-picked a selection of some of the most popular Media pieces from the last twelve months.

<https://www.castlefield.com/home/media/blog/2023-year-in-review/>

CASTLEFIELD AWARDED CISI CHARTERED FIRM™ STATUS

Castlefield has officially been awarded CISI Chartered Firm™ status by the Chartered Institute for Securities & Investment, confirming that we're "operating at the highest levels of trustworthiness and professionalism expected from the sector".

<https://www.castlefield.com/home/media/news/castlefield-awarded-cisi-chartered-firm-status/>



RECENT AWARDS AND RECOGNITION

TWO AWARD NOMINATIONS

We're pleased to announce that Castlefield has been shortlisted at the 2024 City of London Wealth Manager Awards (COLWMA) in the 'Best ESG Investment Strategy' category.

At the COLWMA a public online poll is used to determine winners. So please show your support for Castlefield and cast your vote. Details are at this page

<https://www.castlefield.com/home/media/awards-recognition/castlefield-shortlisted-for-city-of-london-wealth-management-award-cowma/>



Castlefield has been recognised as one of best financial advisers in the UK by trade publication Professional Adviser, as we've been named as one of the finalists in the 'Best Adviser Firm for ESG' category.

<https://www.castlefield.com/home/media/awards-recognition/castlefield-announced-as-one-of-the-best-adviser-firms-for-esg/>



THOUGHTFUL INVESTING

DIVERSITY AT CASTLEFIELD

“We believe that when everyone feels valued and included, you do the best work of your life.” – Quote from our very own Ewelina Niziolek-Wilson

You can find out more about the diversity of Castlefield co-owners and their perceptions of working life at Castlefield in our latest Diversity & Inclusion Report, available on our website.

<https://www.castlefield.com/home/about-us/careers/diversity-at-castlefield/>



WORKFORCE DISCLOSURE INITIATIVE (WDI)

Castlefield continues to actively support the Workforce Disclosure Initiative (WDI), which aims to increase corporate reporting and transparency on workforce and supply chain issues. This year, 13 investee firms were encouraged to strengthen their disclosures on workforce issues. Learn more about our involvement here:

<https://www.castlefield.com/home/media/blog/the-workforce-disclosure-initiative-wdi/>

COP 28 REVIEW

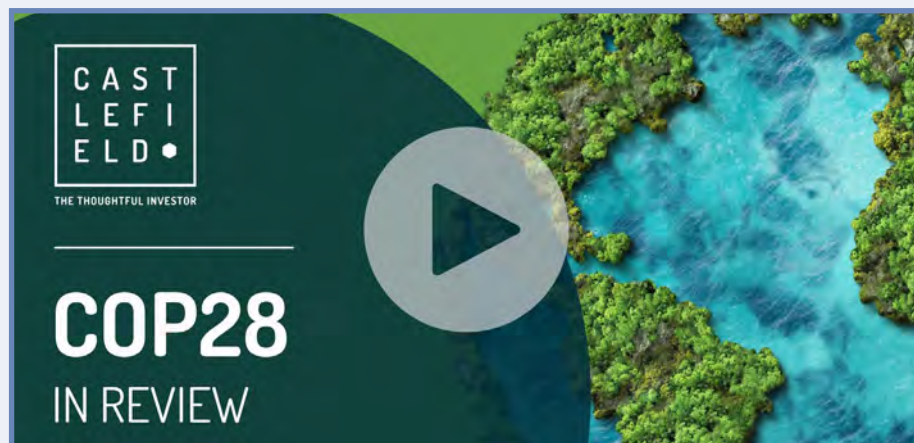
In this review of COP28, Castlefield's David Gorman takes a look at the latest UN Climate Conference COP28 and considers if the outcomes aligned with pre-conference expectations.

<https://www.castlefield.com/home/media/blog/cop28-review/>



And video of David Gorman where he considers if the outcomes aligned with pre-conference expectations:

<https://www.castlefield.com/home/media/videos/video-cop28-in-review/>



CARBON DISCLOSURE PROJECT (CDP) NON-DISCLOSURE CAMPAIGN: ENCOURAGING ENVIRONMENTAL IMPACT DATA

As responsible investors, we need companies to report on how their activities impact the environment. For the third year we've encouraged companies to disclose via CPD's non-disclosure campaign - the worlds largest disclosure platform. See how we got on:

<https://www.castlefield.com/home/media/news/encouraging-environmental-impact-data-through-the-cdp-non-disclosure-campaign/>



FINANCIAL ADVICE

HOW AN ADVISER COULD HELP YOU

Clients seek our help for a number of different reasons. For example, planning their retirement, dealing with a change in circumstances (e.g. inheritance, divorce, downsizing), selling a business or for advice on using their money to do good (investing ethically, charitable giving & philanthropy). These recent examples help to demonstrate some of the different ways an adviser could help you.

<https://www.castlefield.com/home/thoughtful-investor/case-examples/>



PHILANTHROPY SUMMIT



The Philanthropy Summit was an invitation-only event for philanthropists, grant-making charitable trusts and their professional advisors, exploring how individuals can give money effectively and how their professional advisors can support them.



Castlefield Partner Olivia Bowen presented at the event, alongside some of the region's leading philanthropists, about how she's helped clients and the natural intersection between thoughtful investing and charitable giving.

EVENTS

CATHEDRAL EVENT – ESTATE PLANNING

Date: Friday 19th April 2024, From 10:30am

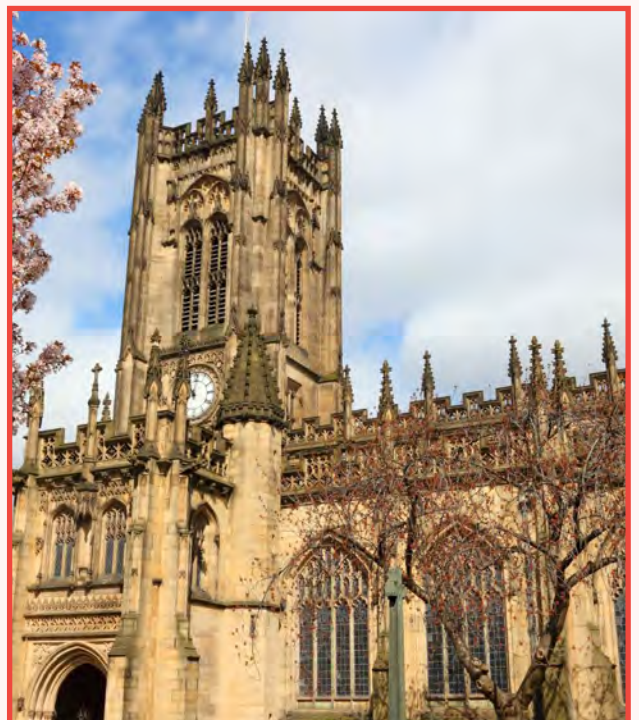
Location: The Library at Manchester Cathedral

Castlefield partner, Olivia Bowen, will be talking to parishioners of Manchester Cathedral about their future estate planning and how they can make a difference to the people and causes they care about. Olivia will join speakers from BDO and Brabners at this free event offered by the cathedral.

To join this free event, please email Anthony at: beapartofit@manchestercathedral.org



Scan the QR code to book.
Limited places available.

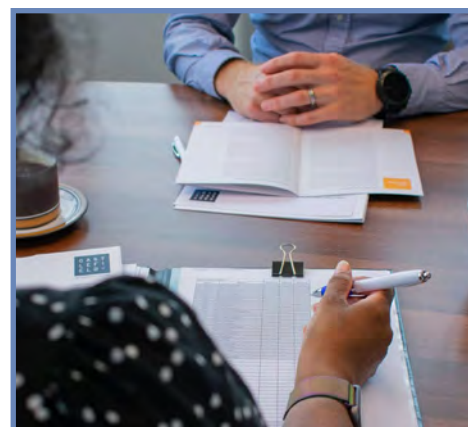


DOES YOUR CHARITY NEED ADVICE?

Our specialist Charity Investment Advice Service has been designed to benefit charities who have identified a specific need for one-off advice, by guiding them through the necessary steps and working with them to ensure their mission is supported for the long-term. This may include helping to understand what level of risk they're comfortable with, providing guidance on the investment duties and responsibilities of a charity trustee, or helping to define their objectives so they have clarity on their short- and medium-term priorities.

Find out more about our range of services here:

<https://www.castlefield.com/home/our-services/>



CHARITY / GIVE BACK GROUP (GBG) UPDATES



CASTLEFIELD VOTES TO CONTINUE CHARITY PARTNERSHIP WITH THE BOOTH CENTRE FOR 2024

We're thrilled to announce that after a majority vote among our co-owners, we have chosen The Booth Centre as our charity to support for 2024. This decision reflects our commitment to maximizing the impact of our fundraising efforts.

<https://www.castlefield.com/home/media/charity-work/castlefield-votes-to-continue-charity-partnership-with-the-booth-centre-for-2024/>



CASTLEFIELD'S FUNDRAISING GROUP HELPS TO RAISE OVER £7500 FOR CHARITY IN 2023!

We take a moment to reflect back on the incredible achievements of the Give Back Group over the past year, from raising funds through engaging events to supporting deserving charities. Read how our collective efforts have made a positive impact and learn about the inspiring journey that led to our biggest fundraising year yet.

<https://www.castlefield.com/home/media/charity-work/group-helps-to-raise-over-7500-for-charity-in-2023/>



Find out more about the GBG and our other fundraising initiatives here:

<https://www.castlefield.com/home/media/charity-work/>

CASTLEFIELD CHARITABLE FUND

The Castlefield Charitable Fund enables us to support worthwhile projects with a positive social and environmental impact, providing grants to registered charities with an annual expenditure of under £1million. Find out more about CCF, its purpose and eligibility criteria here:

<https://www.castlefield.com/home/about-us/castlefield-charitable-fund-ccf/>

HAVE YOUR SAY!



We'd love to hear your views and feedback on the marketing communications you receive from us (e.g. videos, web articles, newsletters etc.). Please let us know your thoughts and take our short survey.

All participants will be entered into a prize draw for a year's subscription to Ethical Consumer Magazine!

[CLICK HERE](#)

WE'RE HIRING

We're currently recruiting for a couple of roles at Castlefield. If you know someone who may be interested in joining our team and becoming part of an award-winning, employee-owned business, please get them to have a look at the roles available at this link:

<https://www.castlefield.com/home/about-us/careers/join-us/>



REFER A FRIEND AND RECEIVE A FREE GIFT!

We're delighted so many of our clients speak positively about Castlefield to their friends and family. If you know someone who may benefit from our services, please forward them this newsletter to give them a taste of what we're about. As a thank you, you'll receive a year's subscription to Ethical Consumer magazine if they subsequently become a client. Just tell them to provide your name as the source for how they heard about us.

Contact: enquiries@castlefield.com



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Follow us on our social media channels to get the latest news, updates and opinions from the Thoughtful Investor ®.



OUR VIEWS AS THE THOUGHTFUL INVESTOR ® DON'T STOP HERE!

To learn more about Castlefield's range of services, please visit our website:

www.castlefield.com

Call us on:

0161 233 4890

Visit our contact page here:

www.castlefield.com/contact-us/

Email us:

enquiries@castlefield.com



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