



PRESS RELEASE: FOR IMMEDIATE RELEASE

## Cartwright launches 'Cartwright Charitable Trusts'

**UK – [6 November 2024] – Cartwright, specialists in building financial resilience for small to medium sized trusts, today launched a new brand extension designed specifically to provide tailored solutions to Charities; 'Cartwright Charitable Trusts'.**

The service, which has only been available to a handful of clients to date, will now sit under its own unique brand and work with small to medium sized charities, not-for-profits, and endowments schemes (£5-250m in unrestricted reserves) to support them in reaching a more financially stable future, including investment income sustainability. The offering will include a portfolio health check, an unrestricted assets strategy, mission aligned investment and an innovative bitcoin donation solution.

**Martin Mercer, Head of Charitable Trusts, at Cartwright, commented:** "Charities feel the pressure just like any other organisation, but with considerably less funds and support at their disposal. It's been a challenging few years for everyone, on top of this, charities have also had to deal with declining contributions due to the cost-of-living crisis yet an increase in those who need their services. It has never been more important for them to protect assets while investing sustainability for the future.

"We think they've been getting a raw deal – the quality of advice and consultancy available to them can fall short, and they often lack access to high-quality institutional offerings. While they need support, it shouldn't be one-size-fits-all. Each charity is unique, and generic solutions typically don't lead to long-term success. What they require are tailored approaches that align with their specific needs and the charity's own principles."

**Mercer continued:** "We're particularly excited about our bitcoin donation solution. The rise of digital currencies is transforming the landscape of charitable giving, with major organisations like Red Cross now accepting Bitcoin. This shift allows charities to engage with a new generation of donors and tap into a global community, enhancing flexibility across various currencies. It presents an exciting opportunity, offering lower transaction costs and faster settlements, which means more funds, quicker.

"Our independent status enables us to be agile and innovative, collaborating closely with charities to develop customised, effective solutions tailored to their needs. By accessing new and interesting things all round, and being able to act quickly, means charities create a far more secure, fruitful and resilient position for the future."

-ENDS-



Note to Editors:

## Cartwright Charitable Trusts

Our experience, people and pioneering spirit is what sets us apart.

Cartwright have spent over 38 years honing their unique skill set; to be the ace in the hole for charitable organisations whose unrestricted reserves are on the smaller side.

Cartwright believe less reserves shouldn't mean less attention. So offer the level of service usually reserved for the big players; innovative, professional and totally bespoke. And, with direct access to a real person, an expert in their field, they help charities nationwide build their financial resilience and demystify the world of investments.

Originating in the pensions market, Cartwright soon realised their wisdom in pension trusts could benefit other sectors too – and began applying the same pioneering spirit and unique know-how to help charities maintain their purchasing power.

This commitment to innovation continues to drive their efforts, ensuring they remain at the forefront of addressing shared issues.

Find out more at:

[charitabletrusts.cartwright.co.uk](http://charitabletrusts.cartwright.co.uk)

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