



Epworth
Investing Faithfully

**WS MULTI ASSET FUND
FOR CHARITIES**

INVESTING WITH PURPOSE, STEWARDSHIP & INTEGRITY

At Epworth, our multi asset fund offers a comprehensive solution tailored to charities seeking long-term growth and sustainable income. Our experienced investment team carefully stewards every investment, ensuring they align with Christian values while aiming to deliver consistent results.

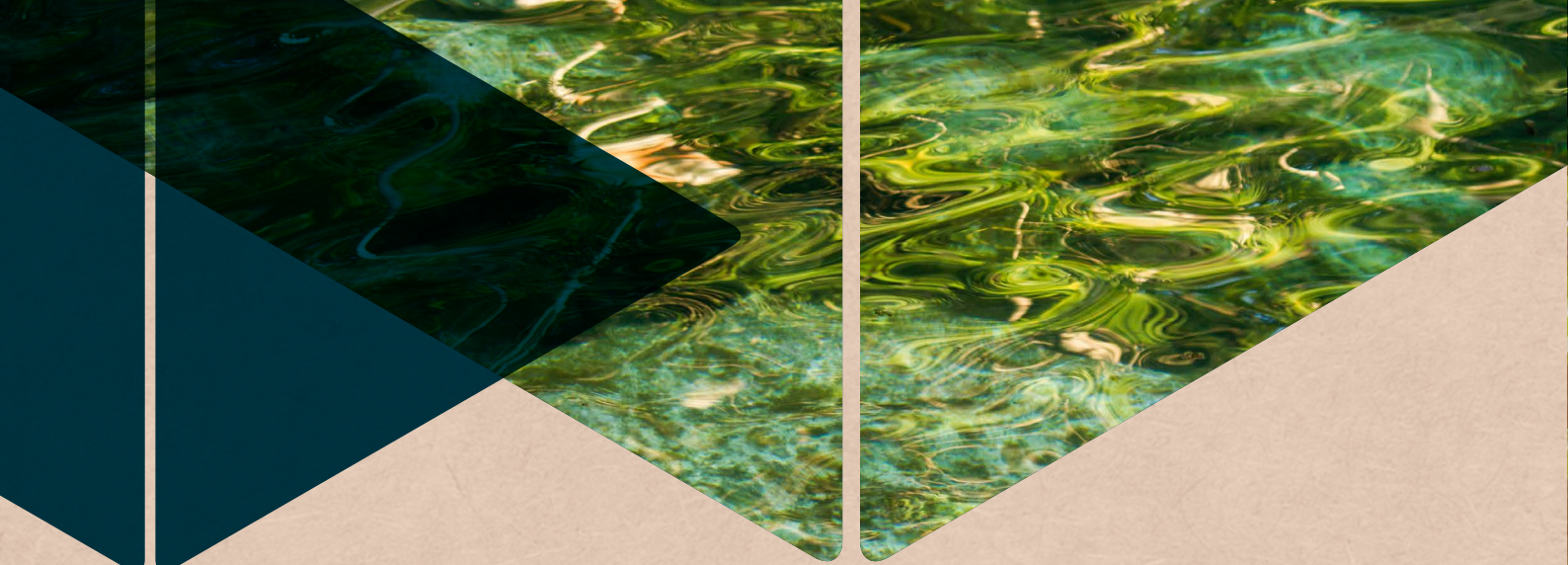
With an award-winning approach, transparent reporting, and daily dealing, we provide a strategy you can trust. The WS Epworth Multi Asset Fund offers the personalised service of a smaller firm with the reliability of a larger institution.

As an added benefit, 50% of our management fee is donated to Christian Aid, supporting communities in need and reinforcing our commitment to responsible investing.

Rooted in decades of ethical investing, we're here to help your charity's mission thrive—driving both financial success and positive social change.



SIMON WOOLNOUGH
HEAD OF BUSINESS DEVELOPMENT



WHY CHOOSE THE WS EPWORTH MULTI ASSET FUND?

RIPPLE OF CHANGE

50% of the WS Epworth Multi Asset Fund's management fee is donated directly to Christian Aid

- ▶ **Ethically Aligned, Purpose-Driven**
Designed for charities, the fund aligns every investment with Epworth's ethical standards—so your capital reflects your values.
- ▶ **Diversified for Long-Term Growth**
A balanced mix of equities, bonds, property, and alternatives, selected for financial strength and societal change.
- ▶ **Real-World Insight**
Through our partnership with Christian Aid, insights from global humanitarian projects shape how we engage with companies on your behalf.
- ▶ **Transparent and Accountable**
See the difference your investment is making with clear, meaningful updates each year.
- ▶ **Led by Experts Who Understand Charities**
Managed by the Epworth team, the fund is rooted in deep financial expertise and lived faith values.

christian
aid

INVEST TODAY TRANSFORM TOMORROW

Epworth and Christian Aid are united in faith and action, creating a ripple of positive change that builds a better world for today and for future generations.

By supporting Christian Aid's In Their Lifetime projects, Epworth is helping to spark lasting change – ending the scandal and injustice of poverty, one life, one community at a time.

“Through this project I am being trained to raise poultry and have also been trained in vegetable cultivation. With the profits I will pay loan instalments and save some of it.

I'm also buying a goat. Previously men and women were very separate. Now we can discuss and understand that in fact, both men and women are equal, and if both work together, then our family life will be better.”

Farida Khatun, ITL Project Participant.

In Their Lifetime



CONTACT US

Please email: enquiries@epworthim.com
or call: **020 7496 3600**

A close-up photograph of water splashing, with several droplets in mid-air and ripples on the surface. The image is partially obscured by a tan-colored geometric shape that serves as a background for the text.

OUR APPROACH TO ETHICS

In 1974, our parent company helped pioneer ethical investing by establishing one of the UK's earliest ethical investment committees – taking a principled stand against UK companies supporting Apartheid in South Africa.

Today, we proudly continue this tradition of responsible stewardship, ensuring that every strategic and investment decision reflects our Christian values and the diverse perspectives of our clients and stakeholders.

Our purpose, investment beliefs, strategy, and culture come together to foster stewardship that delivers long-term value for our clients, while benefiting the economy, the environment, and society as a whole.


We are committed to maintaining an ethical investment strategy that clients can be truly proud of – ensuring their investments drive meaningful, positive change in industry and society.

As part of our wider mission to create lasting change, Epworth donates 50% of the management fee from the Multi Asset Fund to Christian Aid, helping to extend the reach of your investment to support vulnerable communities and create a fairer world for all.

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PURPOSE-DRIVEN INVESTMENTS

We believe faithful investing can shape a better, fairer world.

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ABOUT EPWORTH INVESTMENT MANAGEMENT

With roots dating back to 1960, Epworth is a Christian investment manager dedicated to serving the needs of churches and charities. Our mission is to put your organisation at the centre, understanding and addressing your unique financial and ethical requirements.

By choosing Epworth, you partner with a manager committed to delivering quality and performance without compromising your values.

Proudly part of the Central Finance Board of the Methodist Church

IMPORTANT INFORMATION

Epworth Investment Management Limited ("Epworth") is authorised and regulated by the Financial Conduct Authority (FCA Registered Number 175451). It is incorporated in England and Wales (Registered Number 3052894), with a registered office at Methodist Church House, 25 Tavistock Place, London WC1H 9SF and is wholly owned by the Central Finance Board of the Methodist Church. Epworth-managed funds are designed for long term investors. The value of units in funds can fall as well as rise and past performance is not a guide to future returns. The level of income is also variable and investing in Epworth funds will not be suitable for you if you cannot accept the possibility of capital losses or reduced income. Any estimates of future capital or income returns or details of past performance are for information purposes and are not to be relied on as a guide to future performance.

Please visit www.epworthim.com for full details

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