



Investment Committee: Co-opted Member

Join us!

LionHeart is the independent charity for chartered surveyors and their families. Established in 1899, this year we have been marking our 125th anniversary and, as we look to the future, we're looking for someone to join the Investment Committee as a co-opted member.

LionHeart has significant reserves, with an investment portfolio of some £26 million that generates around 50% of our annual income, with the rest coming from donations and fundraising. LionHeart employs the services of two investment fund managers, CCLA and Sarasin, to manage this investment portfolio.

Our [investment policy](#) describes LionHeart's approach to investment and risk. Risk is such an important subject, bearing in mind the importance of investment income to LionHeart's total income and the fact that LionHeart wants to be around to help the future generations of RICS members and their families.

As we look to continue to expand our board experience, we would particularly welcome applications from qualified accountants or people with significant investment management experience.

The co-opted member does not need to be a chartered surveyor.

Our co-opted committee members are appointed on a three-year term, with the option to renew.

Co-opted committee member positions are unpaid, but any travelling expenses are reimbursed.

An induction will be provided to the successful candidate.

About LionHeart

LionHeart is an independent charity dedicated to supporting professionals associated with the Royal Institution of Chartered Surveyors (RICS), including current and former members, and their families.

Our primary mission is straightforward: to be there for members whenever life throws them a curve ball, from the beginning of their career as an APC candidate or apprentice right through to retirement.

Over our 125-year history, we have developed from our origins as a traditional benevolent fund supporting the widows and orphans of chartered surveyors into an organisation offering multi-faceted support to get people through any of life's unexpected challenges, from financial grants to health, wellbeing and work-related support.

Our commitment extends to a broad spectrum of individuals, including current and past RICS members, their partners, and dependents, from new entrants to the profession to retired or inactive

surveyors, regardless of their location around the world. You can read about the difference we're making [here](#), and some of the individual stories behind the people we help [here](#).

Our overarching goal is to assist as many people as possible, irrespective of their unique circumstances, and we pride ourselves on the personalised support we offer, recognising that each individual's needs are distinct. A core strength of our organisation lies in our dedicated team of experienced support officers who work closely with each person to create a tailored support package that aligns with their specific requirements.

We've also worked hard to expand the proactive support that we offer, so we are reaching people with relevant services before they are in crisis, and are developing strong links with corporate firms, education and training providers and other key organisations to widen awareness and engagement.

Over the last few years, LionHeart has seen a big rise in demand for support, as well as increased global reach. In 2023/24, the LionHeart team had a 10% rise in requests for help - meaning demand for our services has gone up by over 100% in the last five years.

We gave more in grants to families in crisis than ever before - well over £500,000 - and saw an increase in numbers using our counselling and legal advice services. We supported surveyors in 36 different countries.

As an independent charity, our funding relies heavily on the generosity of past and present RICS members who want to help us make a difference to their fellow professionals. We do not receive any government or other external grants.

We have a friendly, hard-working team who really care about the work they do and the difference they make to the surveying community, backed up by a committed group of volunteer trustees and ambassadors.

What are we looking for?

We are looking for people who have skills, experience and knowledge that will be of benefit to the organisation as we continue to develop how we serve the surveying community.

Applicants will need to demonstrate:

- A commitment to the purpose, objects and values of the organisation
- An understanding and commitment to confidentiality and equal opportunities
- Willingness to devote necessary time and effort to prepare for and attend meetings. There are currently 2 meetings of the Investment Committee per year which usually take place in London
- Empathy and a genuine commitment to helping those in need

Knowledge and Experience

- **Essential**
 - Knowledge and understanding of investment portfolios, investment policy and ESG, preferably in multi-asset funds with different risk profiles
 - Experience of effective team working and the ability to negotiate and compromise where necessary

- A positive attitude to and experience of formal meetings, including preparation and active contribution
- The ability to analyse information and challenge constructively, particularly in a formal meeting environment
- A good understanding of the economic and geopolitical backdrop to global investment

- **Nice to have**
 - An appreciation of the role of oversight to a discretionary management mandate
 - An understanding of the boundaries between executive and governance roles
 - Experience of contributing to business planning
 - Innovation, creativity, drive and enthusiasm

What we offer you

So, what's in it for you? Being a LionHeart co-opted subcommittee member can be an extremely rewarding role and gives you the opportunity to be involved in a not-for-profit organisation.

Interested? How to apply...

Please complete an application form. The deadline for applications is Monday 2nd December. Interviews will take place in London on Tuesday 21st January 2025.

Questions?

If you have any questions about the form or the application process please get in touch with Kate Ellis, Governance Manager (kellis@lionheart.org.uk)