



EVENLODE

INVESTMENTS FOR LIFE

CORPORATE SOCIAL RESPONSIBILITY

ADDENDUM TO PARTNERSHIP POLICY

Policy Addendum

Evenlode Investment Management Limited is a subsidiary of The Oak Investment Partnership. This addendum highlights additional CSR policies that are relevant to Evenlode in addition to those set out in the Partnership policy. These will be reviewed annually by The Oak Investment Partnership Board.

Business Ethics

Key to Evenlode's investment philosophy is the policy of aligning our interests with those of our investors – we invest our savings alongside investors, so they can have the utmost confidence that we have their best interests at heart. Our focus is on building long-term relationships with and delivering excellent outcomes to our investors, rather than selling products.

We are transparent with our investors on what investments we select, offering a well-researched portfolio of investments, updating them on their investments through meetings, seminars and literature.

To further emphasise the importance of responsible investment, we have hired a Stewardship Analyst who is responsible for providing ongoing analysis of companies from a stewardship perspective and managing Evenlode's voting and engagement activity. The role involves communicating the Evenlode stewardship message to company management to initiate a more positive social impact in their practices.

Community

In addition to the Community policies within The Oak Investment Partnership CSR policy, Evenlode has donated to a number of charities including:

- Cancer Research;
- Cropredy Cricket Club;
- Chipping Norton Scouts;
- Charlbury Community Centre;



The Long Barn
Chalford Park Barns
Oxford Road
Chipping Norton
Oxfordshire OX7 5QR

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Evenlode is a trading brand of Wise Investments Limited. Wise Investments Limited is authorised and regulated by the Financial Conduct Authority.

Registered Office: The Long Barn, Chalford Park Barns, Oxford Road, Chipping Norton, Oxfordshire, OX7 5QR. Registered in England 4970458. Directors: Angus Aston, Heather Cooper-Harris, Ben Peters, Alexandra Rae, Amanda Sullivan, Hugh Yarrow, Tony Yarrow



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- The Oxford Trust;
- The Friends of Mettupalayam;
- Women's Aid;
- The Lung Foundation;
- World Bicycle Relief
- Breast Cancer Now;
- Brain Research UK

Environment

In addition to the Environmental policies within The Oak Investment Partnerships' CSR policy, Evenlode supports "home working" as a method of minimising their environmental impact.



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