

McCrea Financial Services assist a wide range of charitable organisations based throughout the UK with their investment decisions and portfolios.

Our charity clients require specialised investment advice and as Independent Financial Advisers we can research the market to ensure the investments are appropriate for their needs.



The work we carry out is compliant with charity legislation and we offer a bespoke service designed to meet each charities individual requirements.

Most of the income and gains charities receive are exempt from income tax or corporation tax. However, this only applies to the extent that the money is used for charitable purposes. This can cause issues if a charity makes an investment which is treated as non-charitable expenditure. McCreas have expertise dealing in this area and we aim to ensure the charities do not fall foul of the Charities Commission. It is important the Trustees of the charity take professional advice in respect of any investment decisions made.

There are a number of acceptable investments for charities and we have many years' experience advising on the most appropriate type of investment.

There are a number of acceptable investments for charities and we have many years' experience advising on the most appropriate type of investment. We also take into account whether the charity has an ethical or socially responsible stance they wish to pursue and areas where they particularly wish to invest the charity's money.

Trustees are responsible for controlling the management and administration of the charity and therefore carry out a vital role.

It is important the Trustees have an appropriate mix of skills and expertise. McCreas provide investment advice to a number of leading charities in the United Kingdom and regularly attend Trustees meetings to provide updates and discuss the charities' investment strategy.

We provide regular updates, as well as ongoing advice and recommendations, whilst ensuring sufficient monies are retained in accessible investments in order to meet any ongoing expenditure and financial commitments the charity may have.

Please call or email us if you would like to arrange a no-obligation meeting to discuss if we can help your charity.

Investment Expertise backed up by a Personal Service.

The Financial Conduct Authority does not regulate taxation and trust advice.