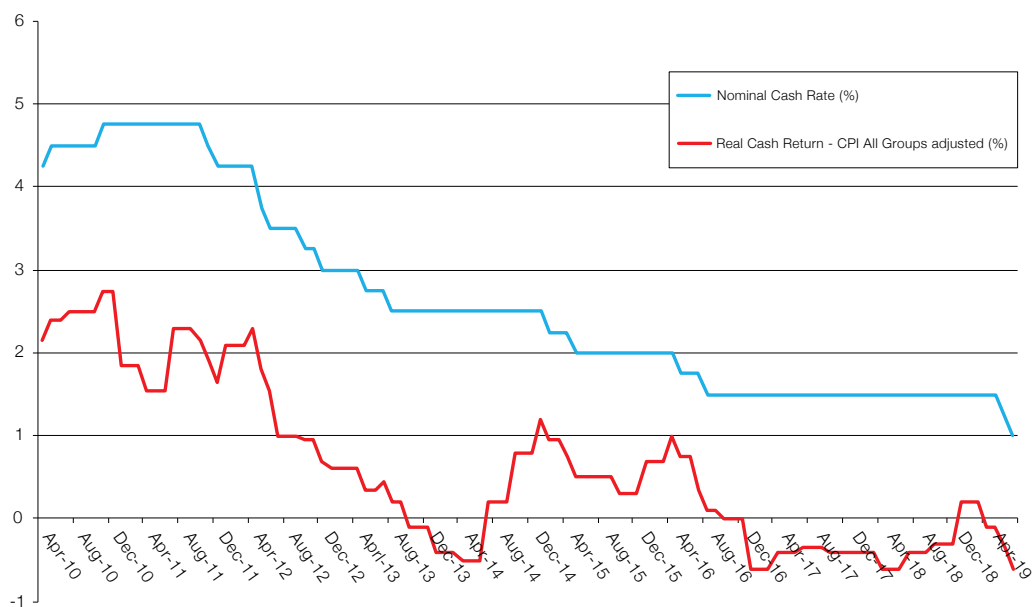


# Investment Governance And Strategy For Local Councils

Local Councils are critical to the functioning of Australian society. Local Councils are responsible for many things that matter most to the quality of life for all Australians – libraries, parks, playing fields, building regulations and development, local roads and footpaths, local environmental issues, waste disposal, and many more community services.

The demand for these services continues to increase whilst the resources available to deliver them continues to be challenged. This is especially the case in the current economic environment as low and falling interest rates have created an environment where inflation adjusted returns on cash investment are effectively negative.

**'Real' Cash Returns**



To ensure the Council can continue to meet the needs of your constituents, it needs to consider alternative investment strategies to generate the level of risk adjusted returns it requires. The key to achieving this is to put in place a robust investment governance framework.

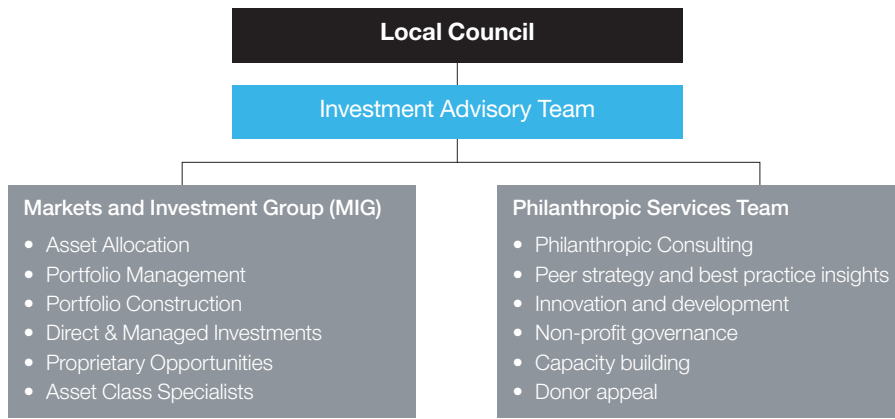
## JBWere – Proven Experience and Expertise

Established in 1840, JBWere is considered one of the leading providers of customised investment management, governance and strategy services in Australia and New Zealand. As at July 2019, JBWere's Funds under Advice totalled \$54 billion.

Of this amount, approximately \$7 billion has been entrusted to us by organisations who are driven by a broader purpose such as Local Councils. Other clients include universities, schools, religious institutions, community organisations and charities.

What aligns all these clients is that they have a fiduciary responsibility – to their beneficiaries, their members, their funders, their students, or their constituents. It is this that makes investment governance the key cornerstone of any investment decision.

JBWere has a team of Governance and Strategy specialists that will work closely with you to develop a best practice framework. Your investment advisors will work closely with these specialists and our Markets and Investment Group to deliver a tailored solution designed specifically to meet the needs of your Council.



## Our investment philosophy

The diagram below outlines our Investment Philosophy - what we believe, what we focus our research and analysis on, and how this manifests in what we do for you as a client.



Our purpose at JBWere is to give clients confidence to do what matters - our focus on clients has made us the partner of choice for more than 179 years. Our strength lies in our ability to understand your goals and ambitions for your communities, and help design tailored investment solutions so your assets are managed effectively – to ensure you continue to deliver the critical services that your constituents need and deserve.

## To understand how JBWere can help your Local Council, please contact:

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