

# STATE OF THE UNION

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STRENGTHENING THE BOARD

## Applicant Pack

Non-Executive Expert Advisor (NEEA)  
Assets & Investments



Seventh-day  
Adventist<sup>®</sup> Church  
BRITISH UNION CONFERENCE

# Asset & Investments role

## Introduction

The British Union Conference of Seventh-day Adventists (BUC) operates within the United Kingdom and Ireland (UK and EU). It serves as the General Conference of Seventh-day Adventists (Head Office) in this Territory. Therefore, its remit and part of its mission-focused strategy derives from the General Conference (GC) in the USA.

The BUC also operates as a governing charity of the territory. Therefore, it operates as a Church (strategic only), a Corporation (UK & EU) and a Charity (England and Wales, Scotland, and Republic Of Ireland Charity Law). All 3 strategic areas require attention as it is expected that the BUC and its territory must comply with UK legislation and best practice while being able to provide advice and guidance to the Territory.

The territory includes:

The South England Conference

The North England Conference

The Scottish Mission

The Welsh Mission

The Irish Mission - including Northern Ireland and Republic of Ireland)

## Purpose of the Role

The Asset & Investment Board Member is responsible for ensuring the development and execution of The BUC's investment strategy, managing its investment portfolio, and overseeing its asset management practices with Board approval. This role is pivotal in advising, endorsing, enabling, coordinating, and governing the development and execution of The BUC's investment strategy, as well as managing its investment portfolio.

## Key Responsibilities:

The principal tasks and responsibilities for the Assets & Investment Board Member at The BUC encompass a wide range of strategic and oversight functions critical to the organisation's financial health and growth.

With regards to portfolio management, the Board Member will oversee the management of The BUC's investment portfolio, delivered by the Board ensuring it is characterised by optimal asset allocation and diversification. This responsibility includes being supportively inquisitive, ensuring that the monitoring of investment performance, assessing associated risks, and making necessary adjustments to the portfolio to achieve and surpass financial targets is carried out.

The Board Member will be responsible for encouraging the Board to take ownership of risk management practices that are implemented to identify, assess, and mitigate financial risks associated with investments and asset management. The responsibility of this role will also ensure that the Board

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complies with all regulatory and ethical standards related to investments and asset management, endorsing robust risk management practices that safeguard The BUC's interests.

## Person Specification

### Skills required:

- Strong analytical and strategic thinking skills, with the ability to develop and execute complex investment strategies.
- Excellent financial and investment acumen, with deep knowledge of financial markets, investment vehicles, and asset management practices.
- Effective risk management capabilities, with the ability to identify and mitigate investment and asset-related risks.

### Experience and expertise:

- Extensive experience in investment management, asset management, or a related field, with a proven track record of successful investment strategy development and execution.
- Demonstrated expertise in financial analysis, portfolio management, and risk management.
- Experienced in presenting complex information in a simple and yet impactful way to maximise engagement.

### Education (guidance notes only)

A bachelor's degree in Finance, Economics, Business Administration, or a related field is typically required. An advanced degree such as an MBA with a specialisation in Finance or a Master's in Finance is helpful. Certifications such as Chartered Financial Analyst (CFA) or Certified Investment Management Analyst (CIMA) are highly valued, reflecting specialised investment management expertise.

### Appointment

This role is a fixed term appointment and will be until 2026, which is the end of the current BUC quinquennium.

**Commitment:** Meetings take place quarterly, with committees, and extraordinary meetings taking place outside of these quarterly scheduled meetings.

[Click here to apply for the Asset & Investments NEEA role to the BUC Executive Committee](#)

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