

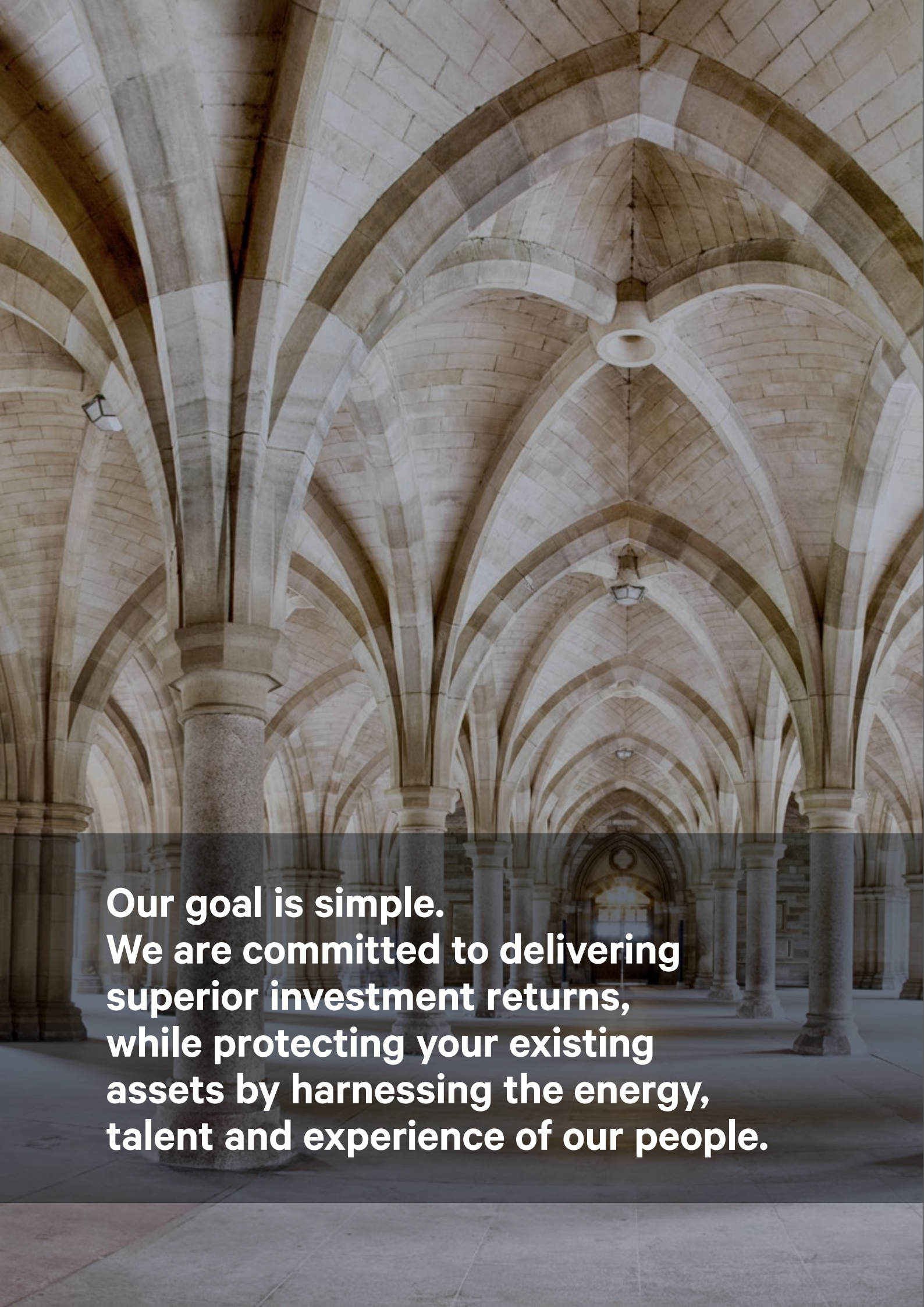
The Davy logo consists of the word "DAVY" in white, uppercase, sans-serif font, centered within a solid red square.

DAVY

The background of the entire page is a photograph of a multi-story stone building with many windows, heavily covered in green ivy. The building is set against a backdrop of trees and foliage. A white rectangular frame highlights a central portion of the building's facade.

# Davy Institutional Consulting Services

Helping institutions to safeguard their  
finances.



**Our goal is simple.  
We are committed to delivering  
superior investment returns,  
while protecting your existing  
assets by harnessing the energy,  
talent and experience of our people.**

# Working together to establish your organisation's goals.

At Davy, we work closely with the executives, trustees and directors of corporate entities, institutions, charities and non-profits where we manage risk and invest appropriately to ensure strategic objectives can be met.

By developing a plan tailored specifically to the achievement of your goals, we can assist your organisation in moving towards greater financial security. We can provide you with the confidence and reassurance that the full suite of your investment decisions is guided by experts who understand what's most important to you.

Our dedicated Institutional Consulting Service (ICS) team has been working with charities and corporates for almost 100 years and is acutely aware of the unique set of challenges that Irish institutions are currently facing. Our mission is to assist the institutions and entities we work with to be reliable providers of services to stakeholders through a rigorous financial planning and investment advisory process.

Our specialised knowledge of sector and industry best practice informs the solutions we provide, which need to meet a range of outcomes, such as liquidity management, preservation of capital, asset-liability matching as well as longer-term endowment and investment management strategies to provide for income and capital growth.

Founded in  
**1926**



Offices in

**5**   
cities



**€24bn**

assets  
under  
management



**€1.4bn**

of ESG  
mandates

# Who we work with

Our specialist team advises a broad range of Irish charities and non-profit entities, religious organisations, cultural and educational institutions, sporting bodies, corporates, public bodies and state-sponsored organisations.

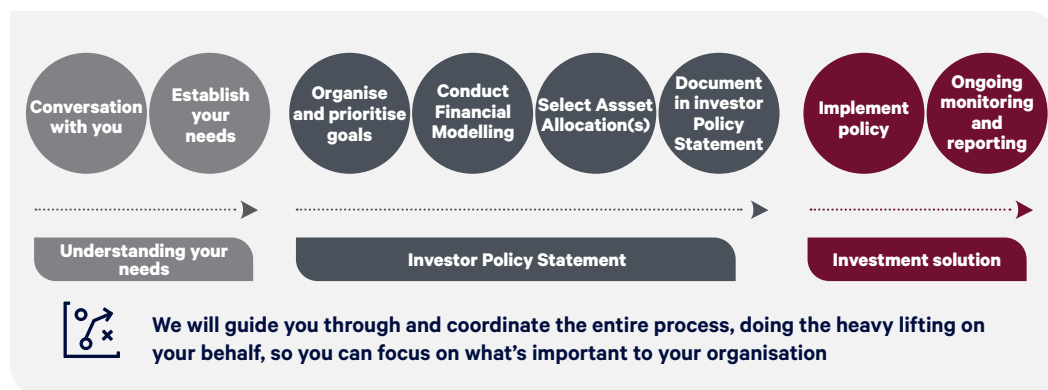
We are also the largest adviser to the credit union sector in Ireland and have a dedicated specialist team serving those clients.



# Our approach

At Davy, we have applied our investment expertise and experience for almost a century to help our clients achieve their investment goals. As our clients' objectives have developed and expanded over the years, our services have evolved beyond investment management to become a broader, more holistic investment consulting service offering.

Many of our clients have a fiduciary responsibility which involves investing or managing assets for others. They can have a broad set of stakeholders which may demand additional oversight and transparency. We have significant experience in investment governance and work closely with clients, investing for the first time, to establish the best governance process and reporting content to not just meet, but exceed, best practice.



Our clients are all unique and although we have developed a robust process, we focus on what you need to prioritise whether it is governance, investment or liquidity management. Our offering is extensive and is adaptable to meet your specific requirements.

A deep understanding of your goals and objectives underpins our needs-based approach. We identify several planning steps to formulate, document and implement the most appropriate investment framework to suit your needs.

# How we help institutions

Aligning financial resources to strategic objectives

	<b>Planning</b>	<p>We are investment advisers, and can help guide your organisations through the complexities of the investment universe, recommending the right solutions for your individual requirements and supporting boards and committees for effective decision making. We can work with you to understand your time horizons around capital planning and ensure capital is invested as efficiently as possible. Capital stacks can be created and monitored as part of an annual review process.</p>
	<b>Corporate treasury Investing</b>	<p>In both high and low-interest rate environments, cash balances demand significant management. We work with your risk tolerances and return requirements to develop alternative options to cash balances. Flexibility remains paramount as your capital may ebb and flow to meet your strategic objectives.</p>
	<b>Investment advisory and management</b>	<p>Good investment outcomes are dependent on appropriate risk taking. Defining risk tolerances can be more complex for organisations. We have extensive experience in working with boards and committees to develop investment risk statements that reflect each organisation's objectives. This feeds into the development of appropriate investment strategies and portfolios that our investment team can implement. Our dedicated investment team has expertise across strategic and tactical asset allocation and investment manager and product selection. We have a strong track record of producing investment returns in line with client expectations and ahead of benchmark.</p>
	<b>Sustainability and ESG Advisory</b>	<p>We align your investment portfolios to your values, developing an ESG (Environmental, Social and Governance) policy bespoke to your organisation. We have in-depth recording capabilities which provide investors and stakeholders with peace of mind that their sustainability preferences are being met.</p>
	<b>Governance</b>	<p>For clients with fiduciary responsibilities, governance is paramount. We can develop a framework and process for your organisation or work within what you already have in place. Good governance is aligned with transparent and up-to-date documentation. We develop Investor Policy Statements for clients, documenting their bespoke investment preferences. These act as an overarching investment document for interaction with fund managers, clearly specifying your objectives.</p>





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# Meet the team



**Donnchadh Ó Mórdha, CFA®**  
Head of Institutional Consulting



**Suzanne Keogh**  
Director of Charities,  
Endowments & Foundations



**Joseph Davy**  
Director



**Mark Stirrat, CFP**  
Associate Director



**Sarah Cush**  
Director



**Katie McGale, CFP**  
Business Unit Director



**Joe O'Brien, CFP**  
Associate Director



**Peyton Frank**  
Senior Associate



**Edward McKeon Silke**  
Senior Associate



**Connor Quigley**  
Investment Associate



**Amber McCann**  
Investment Associate



**Clara Kinsella**  
Client Service Executive



**Shannon Bergin**  
Client Service Executive

# Start the conversation

We would value the opportunity to discuss with you how we can help your organisation achieve your financial goals. Please contact us today to arrange a consultation with one of our advisers.



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**Risks**

There are risks associated with putting any financial or investment plan in place. There is no guarantee that the financial or investment plan will meet its objectives. The value of your investment may go down as well as up. Please note that these risks are not exhaustive and there may be other risk factors which should be taken into consideration. Fees and charges may apply to products or services that you may decide to avail of as part of the Davy service. For additional information on the risks associated with financial or investment planning and the associated costs, please contact a member of the Davy team.

The information contained in this document is not a recommendation or investment research and is classified as a marketing communication in accordance with the European Union (Markets in Financial Instruments) Regulations 2017.

All information correct as at January 2025.

**Marketing Communications**

If you no longer wish to receive marketing communications from us, you can indicate this preference by emailing [optout@davy.ie](mailto:optout@davy.ie) or writing to FREEPOST, The Head of Data Protection, Group Risk, Davy, 49 Dawson Street, Dublin 2. Please note that marketing communications can include, but are not limited to, conference & event invitations, investment/financial planning publications, and economic & product updates. In deciding what marketing communications to send to you and to make them more relevant to you, we may take into account all information we have about you. You have the right to change your mind at any time regarding how we use your information and can do so by contacting us at the email or postal address above.