

Charles Stanley appoints Paris Jordan as Head of Responsible Investing

Charles Stanley is pleased to announce the appointment of Paris Jordan in the newly created role of Head of Responsible Investing. The new role signifies the firm's commitment to further enhancing its responsible investment credentials and further integrating these considerations in its investment strategy.

Paris joins from Waverton Investment Management, where she was a Senior Multi-Asset and Sustainability Analyst responsible for idea generation, portfolio construction, and the responsible investing assessment of more than £2 billion of third-party funds. Paris led on ESG integration for the multi-asset team and worked across the wider investment team to integrate sustainability efforts, ESG due diligence, and impact and engagement propositions.

In 2020, Paris cofounded Virtuvest an responsible investment network for professional allocators that aims to educate, challenge, and combine expertise to assist investment managers, investors, and existing initiatives in achieving a more sustainable world.

Prior to joining Waverton, Paris spent six years at Sanlam Investments UK and served as a Socially Responsible Fund Analyst, where she made significant contributions to the development of ethical investment propositions.

In her new role at Charles Stanley, Paris will be responsible for managing the Responsible Investment research team and leading responsible investing integration and analysis that will inform investment strategy and decisions that reflect our clients' preferences.

Paris joins the 18-strong research team based in London in December and will report directly to Charles Stanley's CIO Patrick Farrell. The team also leverages the extensive research capabilities offered by Raymond James Financial based in the US.

Patrick Farrell, Charles Stanley CIO, said: *"Paris is a highly regarded sustainable investor who brings a wealth of expertise in fund selection, portfolio construction, and sustainability analysis across various asset classes.*

"I'm delighted that she is joining the team to help us further develop our research capabilities and integrate responsible investing analysis across our portfolios."

ENDS

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PRESS RELEASE

About Charles Stanley

Charles Stanley is a leading UK Investment Management Company. Its origins trace back to 1792. It provides services direct to private clients, charities, trusts and professional institutions. It also works with financial advisers, legal, accountancy and other professional services firms, supporting them with their client objectives.

It is dedicated to providing clients with the highest standard of service and peace of mind at every step of their financial journey, delivered by over 800 staff located in 26 offices across the UK. Its services comprise:

- **Investment Management Services**, offering personal discretionary, advisory and execution-only services.
- **Asset Management**, providing investment solutions serving retail, institutional and intermediary clients, such as our model portfolio service (MPS), mutual funds and fiduciary management.
- **Financial Planning**, advising clients on how to plan their finances to meet current and future lifestyles.
- **Charles Stanley Direct**, an award-winning digital execution-only platform that makes investing in a portfolio of funds and shares simple and cost-effective.

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