



# Your Good Finance Profile

Managing your Advisor Profile via  
the Good Finance website





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What we do, why we do it and what you should know.

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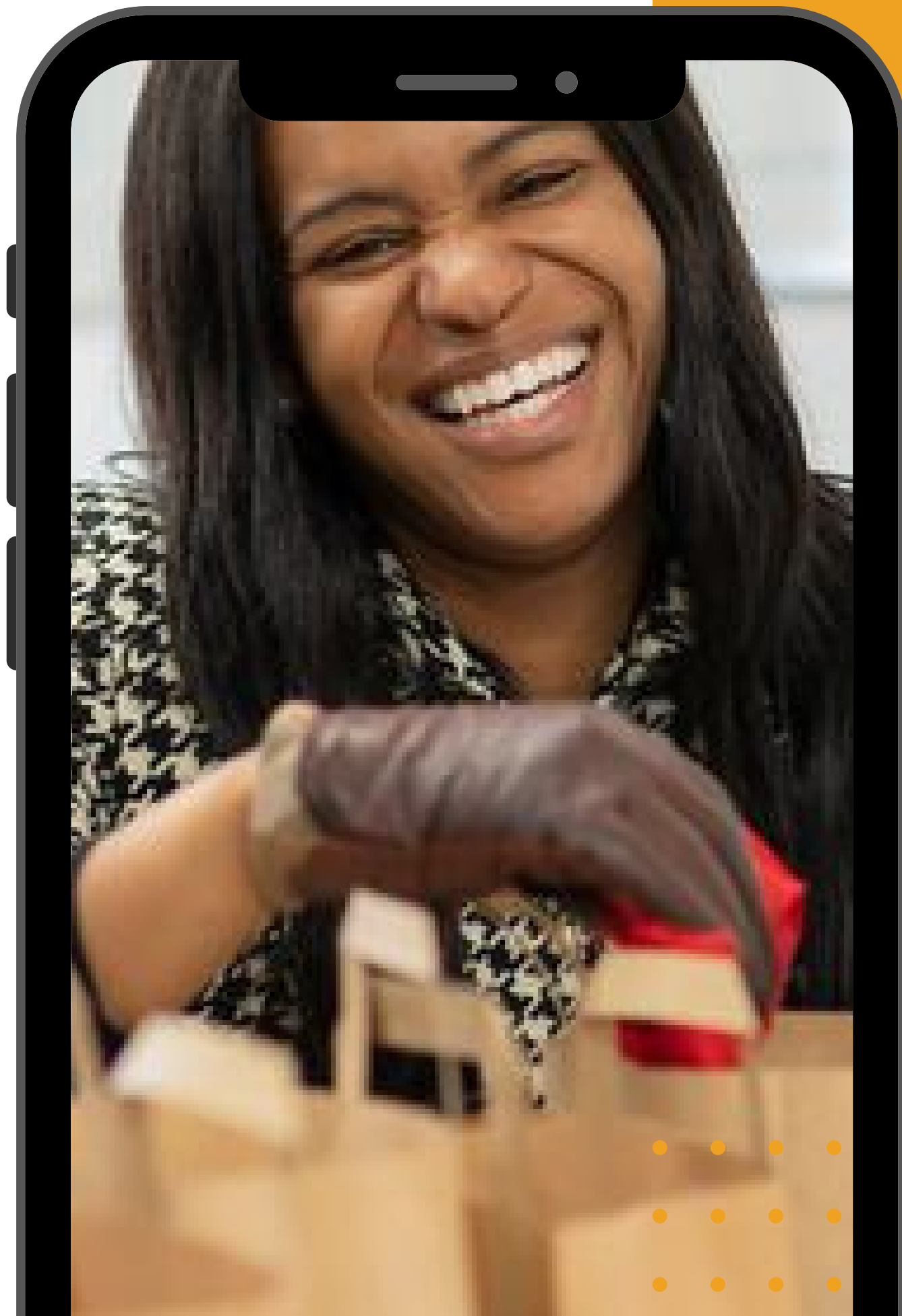
# Good Finance

We are an autonomous and independent platform that supports charities and social enterprises to navigate social investment.

Find out what we offer and how to work with us.



[TAKE ME TO  
GOODFINANCE.ORG.UK](https://goodfinance.org.uk)



# Good Finance

Good Finance is supported and funded by Big Society Capital and Access.

Our mission is to be the trusted, go to place for charities and social enterprises on social investment. We are user led in our work.



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# Good Finance Users

Our users are charities and social enterprises on the journey of navigating social investment.

Some may be early on in this journey, others may be further along.



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# Investors and Funds

The Good Finance investor directory has had over 170K+ unique visitors and is our most-used tool.



[GOODFINANCE.ORG.UK](https://www.goodfinance.org.uk)

# Advisor Directory

We have developed the directory to include a standalone advisor directory for users that are looking for professional services.



## ADVISOR DIRECTORY PROFILES



- Is your organisation's profile listed on Good Finance?
- If you provide support to social purpose organisations, we'd love to see your organisation listed via the Advisor Directory. [Click here](#) to find out more.



- Is your organisation's profile accurate and up to date?
- Good user experience depends on up to date profiles. Please check-in on your profile at least every 6 months to ensure your information is accurate.



**CONTACT US**

**ANNIE CONSTABLE**

Digital Content Manager  
aconstable@goodfinance.org.uk

# Criteria to list

What we look for when listing organisations and funds.



## NEW PROFILES: CRITERIA FOR LISTING

1

- Do you have Professional Indemnity insurance?

2

- Have you supported a charity, community organisation or social enterprise in the last year?

3

- Do you provide dedicated support for charities, community organisations or social enterprises?

4

- Do you have more than one year of working experience as an advisory service / individual?



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aconstable@goodfinance.org.uk



# Criteria to list

What we look for when listing organisations and funds.



## NEW PROFILES: CRITERIA FOR LISTING

The purpose of these profiles is educational. The aim is to:

- Show users the range of advisory services and individuals available
- Provide context with showcase stories that demonstrate how your organisation has helped others

Individual profiles, therefore, should not contain information which could be perceived as “invitation or inducement to engage in investment activity, communicated by a person in the course of business”.

***It is crucial that Good Finance does not breach financial promotion and credit brokering laws as enforced by the Financial Conduct Authority (FCA).***



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Digital Content Manager  
aconstable@goodfinance.org.uk

# What an Advisor Profile looks like

How profiles are set up for good user experience.



## NEW PROFILES: CRITERIA FOR LISTING

- **Contact details:** organisation name and logo, as well as basic information about the account holder. Please note, we require a personal email address here.
- **Introduction:** One sentence overview of your organisation
- **Summary:** Main body of what you do and why you do it, up to 150 words
- **Filters:** Check the right boxes for location, type of organisation and core services provided (for the latter, you can select up to three).

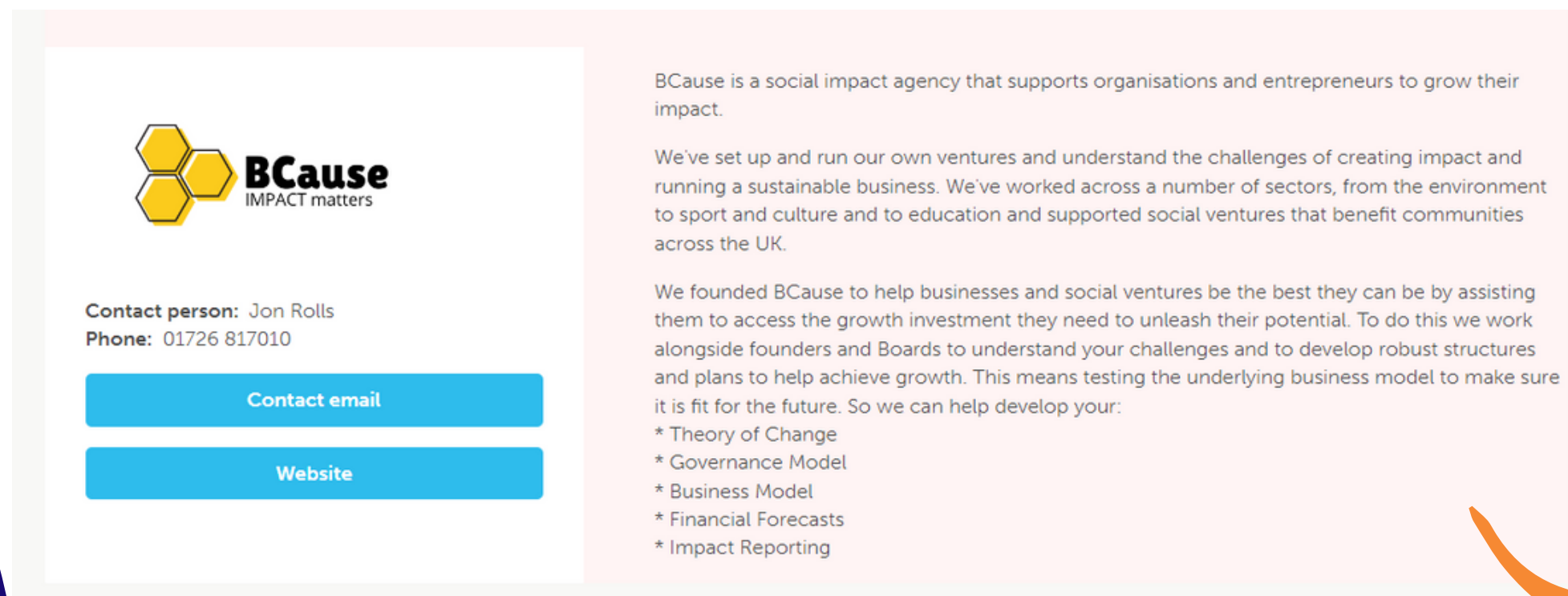


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**ANNIE CONSTABLE**

Digital Content Manager  
aconstable@goodfinance.org.uk

# What an Advisor Profile looks like



**BCause**  
IMPACT matters

Contact person: Jon Rolls  
Phone: 01726 817010

Contact email

Website

BCause is a social impact agency that supports organisations and entrepreneurs to grow their impact.

We've set up and run our own ventures and understand the challenges of creating impact and running a sustainable business. We've worked across a number of sectors, from the environment to sport and culture and to education and supported social ventures that benefit communities across the UK.

We founded BCause to help businesses and social ventures be the best they can be by assisting them to access the growth investment they need to unleash their potential. To do this we work alongside founders and Boards to understand your challenges and to develop robust structures and plans to help achieve growth. This means testing the underlying business model to make sure it is fit for the future. So we can help develop your:

- \* Theory of Change
- \* Governance Model
- \* Business Model
- \* Financial Forecasts
- \* Impact Reporting

Advisor profile with introduction, summary, logo, website + contact details



## Sail Training CiC

### What was their challenge?

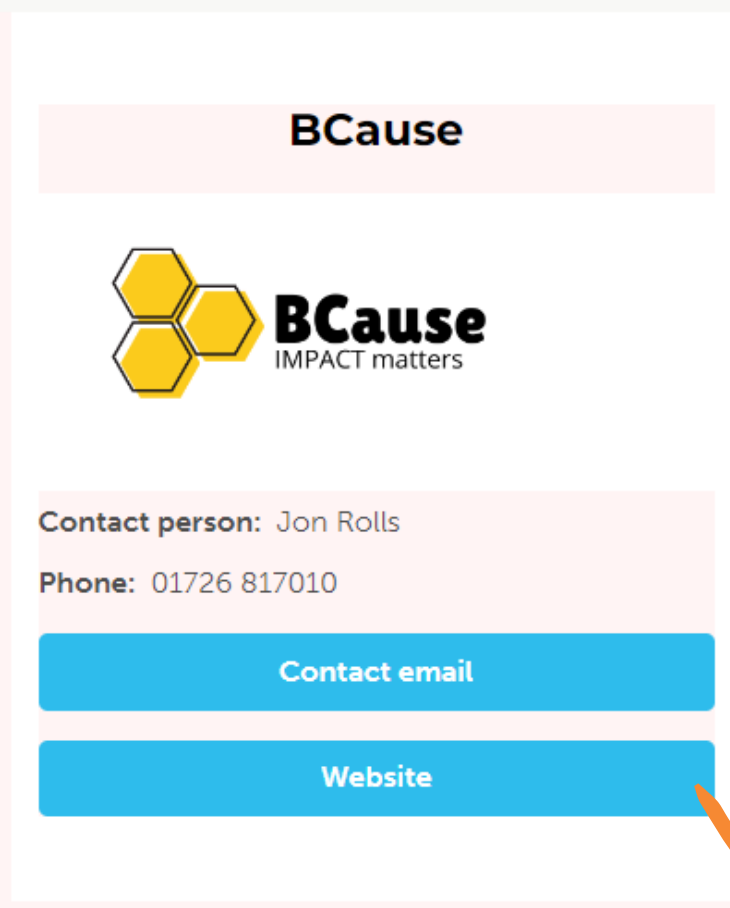
Morvargh does great things supporting young people to gain valuable life skills and growing their confidence and self-esteem through providing inspirational sailing trips on their 57 ft sail training boat. But it's an expensive business to be in with constant upgrades to the kit and the boat, which is often caused by the weather, something totally out of their control!

### What was the support you provided / offered

I've been working with owners Matt and Vicky for a number of years, providing mentorship and social enterprise business support, to help them plan for the future.

### What was the impact or outcome of support?

The impact is that Morvargh continues to grow and build its presence, against all odds. They have made a new home in Cornwall with great new connections and managed to establish themselves as a strong presence in the Fowey area. They completed an amazing Round Britain Trip this year with 10 youngsters which was a huge challenge and they continue to change lives.



**BCause**

**BCause**  
IMPACT matters

Contact person: Jon Rolls  
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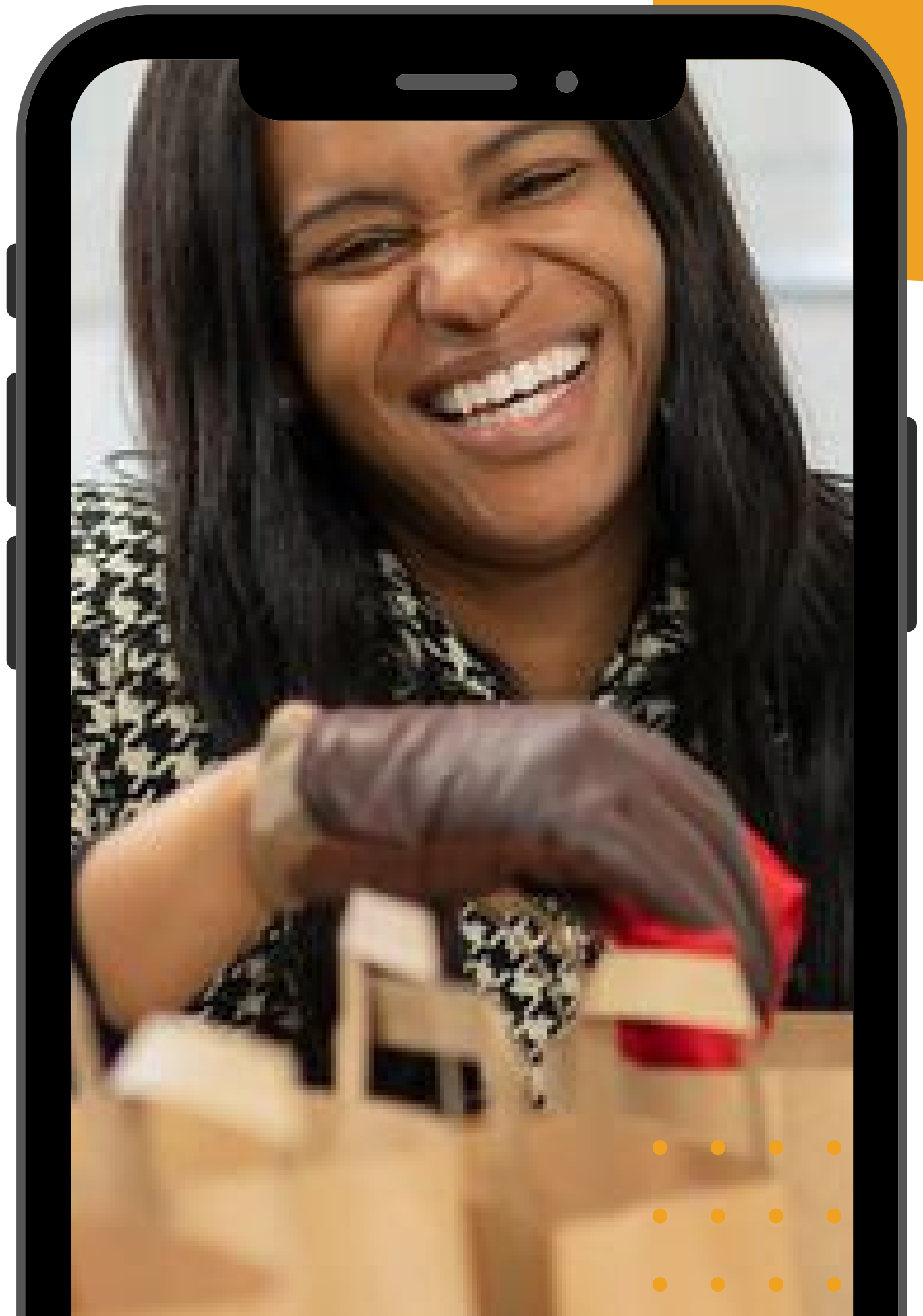
Showcase story that put your work into context and share real life stories and examples of how you've supported social purpose organisations.



**Good Finance  
tools and  
programmes for  
charities and  
social  
enterprises**



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# Website tools



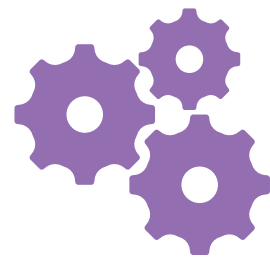
- "Is it right for us" diagnostic tool: enabling organisations to determine if social investment is an option



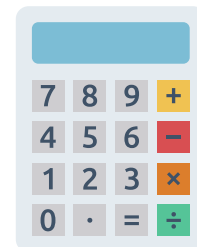
- Investor, funds and advisers directory: signposting organisations to investors



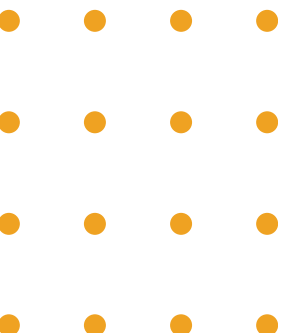
- Jargon Buster: breaking down commonly used jargon and investment terms



- Outcomes matrix: supporting organisations to plan, measure and manage outcomes



- Cost of capital calculator: enabling organisations to estimate repayments.





# Good Finance programmes



**CONTACT US**

## **INVESTMENT COMMITTEES OF THE FUTURE**

- ICs of the Future is an e-learning course upskilling those who wish to join ICs.

## **ADDRESSING IMBALANCE**

- Our engagement programme that connects with Black and ethnic minority led organisations. We work alongside charities, social enterprises and networks to improve access to information, knowledge and resources on social investment.

## **SOCIAL INVESTMENT UNPICKED**

- Social Investment Unpicked is a free online interactive course for anyone who wants to deepen their understanding of social investment.
- It's 6 weeks of supported online learning with a cohort.

**OLIVIA MCLOUGHLIN**

Programmes Manager

[omcloughin@goodfinance.org.uk](mailto:omcloughin@goodfinance.org.uk)



# Programmes coming soon

## E-LEARNING PROGRAMMES IN DEVELOPMENT

Due to be launched in Summer - Autumn  
2023:

- **User Voice:** supporting social investors to explore and develop best practice in user voice practices
- **Due diligence:** supporting charities and social enterprises to understand due diligence and gain an insight into the processes
- **Legal structures:** enabling charities and social enterprises to understand how different legal structures impact social investment.

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Programmes Manager

[omcloughin@goodfinance.org.uk](mailto:omcloughin@goodfinance.org.uk)



**CONTACT US**

# Good Finance Content



Good Finance also develops educational content to shared peer stories and insights on navigating social investment in the form of case studies, podcasts, blogs.

Submit a case study, or get in touch for any other enquiries.

**SUBMIT**



**CONTACT US**

**ANNIE CONSTABLE**

Digital Content Manager  
aconstable@goodfinance.org.uk





# Good Finance Team and Partners





**MELANIE MILLS**

**Head of Social  
Sector Engagement**



**ISHITA RANJAN-  
CHURCHILL**

**Director, Good  
Finance**



**ANNIE  
CONSTABLE**

**Digital Content  
Manager**



**OLIVIA  
MCLOUGHLIN**

**Programmes  
Manager**



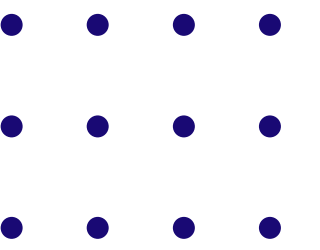
**ABDULLAH  
AHMED**

**Digital Marketing  
Apprentice**

**our  
team**



# The power of partnerships



## Marketing, operations and steering group partners

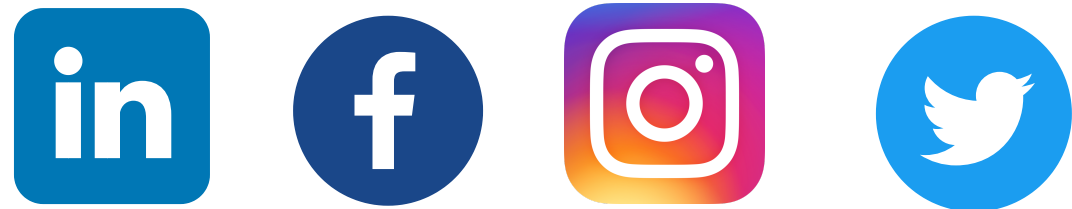
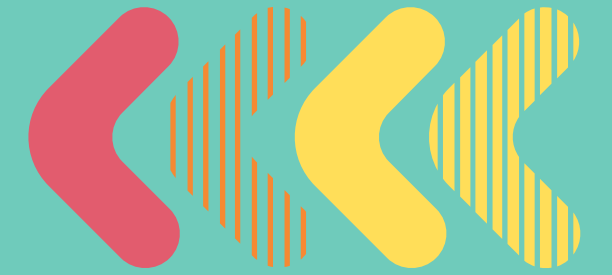
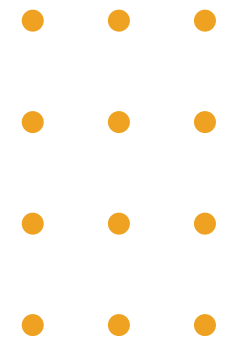


## Addressing Imbalance partners



## Event and Infrastructure partners





**@goodfinanceuk**



**SIGN UP**

# Thank You

Stay posted via our newsletter and socials,  
and don't hesitate to get in touch.

