

Wendy Peters

From: CCLA Investment Management [REDACTED]
Sent: 10 July 2025 07:45
To: Wendy Peters
Subject: CCLA joins Jupiter IM Group

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Against the backdrop of greater regulation, CCLA has for some time been considering the governance implications of its shares being majority-owned by the funds it manages and how we can continue to best serve our clients.

Having reviewed the full range of possibilities and options available to us, that process is now concluded. We are very pleased to share with you that, subject to regulatory approval, CCLA is being acquired by Jupiter Investment Management Group Limited (Jupiter), a leading European investment manager.

We believe that this partnership delivers the best outcome for CCLA's clients. CCLA will become part of Jupiter, retaining the CCLA branding, investment, and client service approach. CCLA's teams will continue to focus on delivering investment returns and outstanding client service to all CCLA clients regardless of their size. CCLA also retains its mission, its stewardship activities, and its drive to build a better world.

At the same time, we stand to benefit from Jupiter's strength and resources. Its market-leading investment capabilities, including its 100-plus investment professionals, will add support to CCLA's existing investment team and product range. Jupiter's extensive distribution capacity both within the UK and abroad will help to facilitate CCLA's future growth, paving the way for us to expand into new markets.

We are excited about becoming a part of Jupiter as it secures our ability to serve the sectors we were established to support and to extend the reach of CCLA's responsible investment approach to a wider audience both in the UK and overseas. We are also pleased to be joining a company that shares our culture and puts the wellbeing of its staff at the centre of its business.

We recognise that many of our clients and supporters will have questions about what this means for their investments and for CCLA. To help address these queries, we would like to invite you to a webinar we plan to hold in September where Peter Hugh Smith, CCLA's CEO, and Matt Beesley, Jupiter's CEO, will discuss the new partnership and what this means for our clients, our staff and the sectors we serve. An invitation will be sent to you in due course.

At CCLA, we have always been proud of our origins in serving churches, charities and local authorities. Serving those who serve others is both humbling and rewarding. We cherish the trust our clients have placed in us and while we look back with gratitude at the last six decades, we look forward with heightened ambition and renewed confidence to all that we will help our clients achieve in the years to come.

Peter Hugh Smith
Chief Executive

Q&A

We have anticipated some immediate questions from our clients and provided answers to these below:

What is the effect for clients? Will there be changes for clients?

You should expect no change. Behind the scenes there will be more resources and support to better serve you. CCLA's teams will continue to focus on delivering investment returns and outstanding client service to all of our clients regardless of their size.

Do I need to do anything differently? Will I see any changes to my reporting?

You do not need to do anything differently. There will be no changes to your reporting.

Will CCLA's structure change?

Yes, this will change CCLA's ownership structure. Once FCA approval is granted, CCLA's shares will be acquired by Jupiter Asset Management.

Will my account number change?

No, there will be no change to account numbers.

Will there be any change to how my funds are managed?

No, these will be managed by the same team that currently manages them.

Will CCLA change its name?

No, CCLA will retain its identity.

Does the change in ownership change the investment style?

No, there will be no change to our investment team, approach or philosophy. Your fund will be managed by the same team as currently.

Will there be any change to the fees I pay?

No. Your fees will remain the same.

Will there be any changes to the service I have access to currently? E.g. Client Services team available by phone and email?

There will be no change to your client services.

Will there be any changes to the senior management at CCLA?

There are no plans for change in the senior management.

Is CCLA still taking on new clients?

Yes! CCLA continues to grow, and we remain excited about the future growth of the business.



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