



Investment Policy

Approved by the EREA Board: 31 July 2015

- Rationale:** There is a need for EREA to have an Investment Policy to ensure funds are invested appropriately in institutions with returns maximised and where risk can be managed. Guidelines and protocols will be developed to assist all EREA schools/entities to have consistent investment strategies.
- Principles:** The Investment Policy of EREA and related Guidelines reflect the Charter and are underpinned by EREA core values.
- Policy Statement:** All groups within EREA: schools, entities and offices, will follow agreed guidelines and protocols when investing funds.
- Applicable to:** All groups within EREA (Schools, Entities and Parent Entity).
- Key Responsibilities:** The Executive Director has responsibility for the implementation of this policy and to oversee the development of Guidelines for investment of surplus funds within EREA.
- Effective From:** August 2015
- Review:** Consideration will be given every 2 years to determine if this policy requires review earlier than July 2018.
- Related Information:** EREA Investment Policy Guidelines.