

Bishop's Stortford University of the Third Age (B/S U3A).

Useful Policy Statements

INVESTMENT'S (B/S U3A FUNDS)

B/S U3A has an investment policy which allows the investment of funds surplus to immediate needs to be placed with reputable organisations with the aim of maximising both capital growth and investment growth without taking undue or unnecessary risks.

INVESTMENT GROUPS (WITHIN B/S U3A)

It is perfectly acceptable to have an interest group that learns about the stock market and researches, buys and sells a virtual portfolio. This is educational and therefore within B/S U3A's charitable objectives.

It is not, however, permissible for a B/S U3A group to trade in stocks and shares.

In this situation the group must operate outside B/S U3A, must not have U3A in its title and must not be listed in the B/S U3A programme.

EQUAL OPPORTUNITIES

B/S U3A pursues an equal opportunity policy and, as far as it is within their power to do so, provide equality of treatment to any person in their third age regardless of:

- Educational background.
- Sex (including gender reassignment).
- Marital status (including civil partnership status).
- Sexual orientation.
- Race or racial group (including colour, nationality and ethnic or national origins).
- Religion or belief.

Approved by the B/S U3A executive committee July 2017

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