



Pro-bono Advisory at Rothschild & Co

Information and application for charities and social enterprises

Rothschild & Co is one of the world's largest independent financial advisory groups.

Having been at the centre of the world's financial markets for over 200 years, we can rely on an unrivalled global network of trusted professionals and decision makers. This means that we have in-depth market intelligence, bringing us closer to current issues than any other global financial institution.

Our 3,400 talented employees spread across 50 offices around the world have a strong track record of outstanding execution in three business lines: Global Advisory, Wealth and Asset Management, and Merchant Banking.

It is this combination of scale, local knowledge and intellectual capital that allows us to provide a distinct perspective and effective long-term solutions for our partners.

Community Investment

At Rothschild & Co, we believe that how much you are able to achieve in life should not depend on your individual circumstances or background. This is why our Community Investment programme seeks to make a meaningful difference to the lives of disadvantaged young people.

Pro-bono Advisory

Our Pro-bono Advisory programme deploys the skills of our employees to help charities and social enterprises scale-up and reach more disadvantaged young people.

Our core Pro-bono Advisory offering relates to certain skillsets found across all three of our business lines:

1. Global Advisory,
2. Wealth and Asset Management, and
3. Merchant Banking.

From time to time we also offer help with business support functions such as Human Resources, Legal, Compliance and Risk, Corporate Affairs, Finance, Strategy and Business Planning, and IT.

We offer pro-bono advice both on an ongoing and on a one-off basis. There is one application process and we offer the type of support we feel would be most appropriate in any given case.

What we can offer: Pro-bono Advisory using our core business skills

- We can provide support in the creation of financial models within Excel, resulting in an easy-to-use model that covers the current financial period and the next three to five years. Models are built from scratch by the project team, in conjunction with your organisation and are entirely tailored to the specific circumstances and requirements. The models will allow you to easily change various inputs e.g. funding received, costs, growth etc. to see the impact on your key financial metrics such as funds coming in, projections for future funding, financial commitments, potential new commitments, balance sheet assets, and future return on investments.
- In addition to helping with financial modelling, we can provide assistance in the articulation of these ideas. We have expertise in the production of presentations tailored to specific audiences to convey potentially complex messages in an impactful manner. We can offer expertise in messaging to both internal and external stakeholders e.g. senior management, boards, trustees, other employees, potential merger counterparties, potential sources of funding, and clients.



- As a business, we are a global leader in mergers and acquisitions (M&A) and so further to the above, if your organisation is currently considering undergoing a merger, de-merger or re-structuring, we will be able to offer advice from a highly skilled team that specialises in these areas.

When this type of support is most relevant and who we intend to support

- We are best placed to help an organisation that wants to scale-up and reach more disadvantaged young people. This may, for example, be through expansion, improving finances or a merger.
- We often work with the senior management teams of organisations (for example the CEO or Finance Director).
- We accept applications from any size of organisation; however, we think that those with a turnover of £500,000 or more will benefit most.
- The ways in which we can help and the criteria outlined above are not intended to be exhaustive and if, based on what you have read, you feel we can be of help we would encourage you to complete an application form.

What we can offer: Business Support

Our Business Support departments are equipped to provide help and support to your organisation across a range of day-to-day business functions. For example:

- HR: recruitment, reward, performance reviews, payroll
- Marketing, PR and communication: social media, internal and external communications
- CSR: corporate and charity partnerships, environmental management
- Strategy and business-planning: evaluating a portfolio of ideas, prioritising these and building financial business plan
- Risk management and governance issues: anti-money laundering, risk mitigation and contract law

When this type of support is most relevant

We welcome applications for this type of support from organisations at any stage of their development.

Examples of issues we are not able to help with

- General management consultancy
- Legal advice relating to charity governance
- Accounting advice
- Fundraising advice and/or advice around investment or the use of reserves
- Training on presentation delivery
- Competitor analysis or valuation/ pricing of products or services
- Financial advice regarding liabilities such as pensions
- Consultancy advice regarding integration of teams/company system
- Advice around charity law/accounting, or specialist legal and compliance subjects that are not related to financial services



Qualifying for support

- In order to be eligible to receive Pro-bono Advisory support, your organisation should have a social purpose (social enterprises and charities etc.).
- Your organisation must be dedicated **primarily** to supporting – directly or indirectly – disadvantaged young people aged 0 to 30. 'Primarily' means that **at least 50% of funding is spent in this way and/or that at least 50% of the beneficiaries are disadvantaged young people.**
- Applications are accepted on a rolling basis throughout the year and you can apply for support at any time.

For more information contact: UKCommunity.Investment@RothschildandCo.com