Westminster Abbey

Application pack



Chair of Investment Panel

Term: 4 Years

Closing Date: 7 January 2027

Westminster Abbey

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About Westminster Abbey

Above all else, the Abbey is a church, a place of prayer and praise and holy ground at the heart of the nation. It is also a treasured part of Britain's heritage and a leading venue for tourism. The Abbey has occupied a central place in the celebration of great events for the nation and remains one of the most beautiful architectural masterpieces in Britain.

A living Church, Westminster Abbey is where the coronation of Kings and Queens has taken place since 1066, and where many of the Kings and Queens of England and of the United Kingdom are buried. Principal among them is St Edward the Confessor, King of England from 1042 to 1066, whose shrine is at the heart of the Abbey Church. Beside and around them are buried or commemorated many of the great women and men from almost every century of British history: statesmen and politicians, lawyers, warriors, clerics, writers, artists, musicians.

Neither a cathedral nor a parish church, Westminster Abbey is a Royal Peculiar under the jurisdiction of a Dean and Chapter and with direct accountability to the Sovereign. This relationship with the Sovereign dates back to the origins of the Abbey over a millennium ago, but its current form stems from the Charter granted to the Abbey by Queen Elizabeth I on 21st May 1560. The Abbey is formally known as the Collegiate Church of St Peter in Westminster.

We are a welcoming community, but also complex and multi-faceted, with over 600 highly committed employees and volunteers. We have deep respect for the heritage of which we are the custodians, but we evolve continuously to meet the opportunities of the future. In recent times this has included the creation of new departments to focus on transforming our digital presence and delivering a significantly expanded programme of public and community engagement.

Westminster Abbey's mission is:

- To offer daily divine Worship to Almighty God and resource the Church in this vocation;
- To serve the Sovereign;
- To proclaim the Gospel to the nation and Commonwealth, celebrating the distinctive witness of the Christian faith and engaging with the public square;
- To provide a safe, welcoming and inspiring environment for all who come to the Abbey;
- To care for the precious resources entrusted to us: our people, partnerships, buildings, heritage and money.

Values

We have three guiding principles:

- We are a **community.**
- We are sustained by **hope.**
- We strive to be **faithful** in all that we do.

Following the State Funeral of Her late Majesty Queen Elizabeth II and the Coronation of Their Majesties The King and Queen, which were broadcast to national and international audiences in their millions, interest in the Abbey is very strong. We attract over 1.6 million people from around the world every year. As we receive no regular income from the State, the Church of England or the Crown, we rely almost entirely on income from visitors, with thriving retail, catering and event businesses making a significant contribution to that income.

It is an exciting time to become part of the Abbey community, and we look forward to receiving your application and, if successful, welcoming your contribution to the Abbey's history.

Chair of the Investment Panel
About the role

The Investment Panel comprises five independent members with relevant financial and investment expertise, one of whom also currently chairs the Abbey's Finance Advisory Committee. It is supported by representatives from the Abbey's Finance Department. Established under the Westminster Abbey Act 1975, the Panel's purpose is:

"To keep the investments in the Pool under review and to instruct and advise the Chapter about any changes which may seem desirable."

The Abbey's portfolio of around £100 million is currently managed by RBC Brewin Dolphin.

We are seeking to appoint a Chair of the Investment Panel to provide leadership, direction and independent challenge, to enable the Panel to fulfil its responsibilities.

The successful candidate will bring substantial experience of financial markets, corporate finance, asset management or a related discipline, together with the ability to build strong relationships and guide strategic discussions.

If the candidate chosen as Chair is already a member of the Investment Panel, another outcome of this process could be to invite an applicant not selected to be Chair role to serve as a member of the Investment Panel.

The Abbey's ethical investment policy follows the practices recommended by the Church of England's Ethical Investment Advisory Group.

This voluntary appointment offers a valuable opportunity to contribute to the long-term stewardship of the Abbey's resources and support its mission for future generations.

As part of the Abbey's commitment to fostering a diverse and inclusive community, it welcomes applications from candidates of all backgrounds, experiences and perspectives.

Key Responsibilities
Committee Leadership

- Chair Investment Panel meetings, making discussions effective, balanced and focussed on strategic priorities.
- Develop meeting agendas in partnership with management and Panel members.
- Encourage constructive challenge, independent thinking, and sound decision-making.
- Operate the Panel in accordance with its terms of reference.

Investment Strategy

- From time to time to review the Abbey's investment strategy.
- Monitor that the investment objectives align with the Abbey's mission, ethical policy, financial plans and long term funding requirements.

Governance and Relationships

- Maintain appropriate standards of stewardship and regulatory compliance.
- Act as the principal link between the Panel and the Abbey's Finance Advisory Committee.
- Build effective relationships with investment managers, advisers, custodians and other professional partners.
- Support the appointment and development of Panel members, and lead periodic reviews of the Panel's effectiveness.

Person Specification

- Significant senior-level experience within investment management, asset management, pensions, endowments, banking, wealth management, corporate treasury, or a comparable environment.
- Experience chairing committees, boards, or other governance bodies.
- Strong understanding of portfolio construction, risk management, and performance assessment.
- Experience working with professional advisers and fund managers.
- Sound understanding of fiduciary duties and governance responsibilities.

Essential Knowledge and Skills

- Excellent strategic and analytical capabilities.
- Strong leadership, facilitation, and influencing skills.
- Ability to provide constructive challenge while building consensus.
- High standards of integrity, judgement, and professionalism.
- Excellent communication and presentation skills.
- Commitment to effective governance and accountability.
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Desirable Experience

- Experience as a charity trustee or committee member
- Knowledge of charity investment regulations and guidance.
- Experience overseeing responsible, ethical, or ESG investment strategies.
- Professional qualifications such as CFA, CISI, IMC, or equivalent experience.

Personal Attributes

- Commitment to the Abbey's mission and values.
- Independent thinker with sound judgement.
- Credibility and confidence operating at Board level.
- Collaborative and inclusive leadership style.
- Strong ethical standards.

Key Outcomes

The Chair of the Investment Panel will be expected to:

- Develop the Abbey’s financial assets so they support the Abbey’s long-term strategic objectives, and recognising that some reserves may be needed at short notice.
- Maintain effective investment governance and oversight.
- Deliver appropriate investment performance within agreed risk parameters.
- Support informed, evidence-based decision-making by the Board.

Terms of Appointment

Duration
Our expectation is that the Chair would serve for four years. By mutual agreement there may be one four-year re-appointment served. Members will receive reimbursement of all out-of-pocket expenses including travel, but should note this role is honorary.

Time Commitment
Includes four meetings per year, approximately 2 hours in duration, plus suitable preparation time, and related meetings on specific topics from time to time.

Location
Meetings are held in person at Westminster Abbey.

Reports to:
Westminster Abbey – Finance Advisory Committee

Equality statement and How to apply

Equality Statement
The Dean and Chapter aims at all times to recruit the person who is most suited to the job. Recruitment will be solely on the basis of the applicant's abilities and individual merit as measured against the criteria for the job. Qualifications, skills and experience will be assessed at the level that is relevant to the office.

The Abbey aims that its shortlisting, interviewing and selection procedures will avoid discrimination in any way, including on grounds of age, disability, gender, marital status or civil partnership, race, nationality or ethnic origins, religion or belief and sexual orientation.

Safeguarding
Westminster Abbey is committed to the safeguarding of children, young people and adults at risk. To prevent them from harm, we undertake appropriate checks on staff and volunteers and require them to complete relevant safeguarding training. This post requires a basic level criminal record check.

Application Process

If you would like an initial conversation about this role prior to your application please contact John Neilson, Deputy Receiver General and Director of Finance via john.neilson@westminster-abbey.org

To apply, please complete the application form on the careers portal which includes uploading a copy of your CV and completing a supporting statement outlining why you are interested in serving on the Investment Panel.

Alternatively, you may email a copy of your CV and supporting statement directly to careers@westminster-abbey.org.

The closing date for applications is 7 January 2027.

Interviews are scheduled to take place 1 February 2027.

All appointments are subject to the following conditions;

- A minimum of two references deemed satisfactory by Westminster Abbey
- A satisfactory Basic Disclosure from the Disclosure and Barring Service (DBS)
- Online search via the Companies House Disqualified Directors Register
- UK Sanctions List search

Signed declaration of any conflicts of interest

We regret that, due to the large number of applications we normally receive, we may only be able to contact you or provide feedback if you have attended an interview. We appreciate your interest in our work at Westminster Abbey.