



PRESS RELEASE

Cartwright launches 'Cartwright Funeral Trusts'

UK – [13 February 2025] – Cartwright, the pension specialist for defined benefit and hybrid schemes, today unveiled a new brand extension, 'Cartwright Funeral Trusts', to deliver tailored investment solutions to Funeral Trusts.

The service, which has only been available to a handful of clients to date, will now sit under its own unique brand. It's designed to help Trustees of funeral trusts tackle key challenges such as balancing growth and risk, ensuring cashflow and meeting regulatory requirements.

Tom Hawthorn, Head of Funeral Trusts at Cartwright, commented: "Managing a funeral trust in today's uncertain world is no easy task. Trustees face a delicate balancing act—ensuring healthy returns while minimising risk, maintaining liquidity, and navigating increasingly stringent regulatory requirements. Many trusts feel stuck with outdated strategies that either expose them to unnecessary market volatility or hold too much in cash, losing ground to inflation.

"We've developed a straightforward, bespoke process to address these challenges. We design, implement, and monitor strategies that strike the right balance between growing assets, managing risks, and keeping costs low. By leveraging institutional-quality funds and fees typically unavailable to retail investors, we provide bespoke solutions to the unique circumstances of each trust providing peace of mind not only to the Trustees managing these arrangements but, ultimately, the individuals who've had the foresight to put them in place so as not to burden their loved ones."

This new service follows the announcement of Cartwright Pension Trusts and Cartwright Charitable Trusts at the end of 2024 and Cartwright Employee Rewards earlier this year.

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