Investment Policy Statement

Objectives, allocation ranges, risk limits and governance in one framework.

INSTITUTION / MANDATE	SCOPE / REVIEW PERIOD
To be defined for the engagement	To be agreed with the institution

01 Purpose & mandate

Record the institution's objectives, investment horizon, liquidity requirements and decision authority.

02 Allocation & constraints

Define permitted asset classes, policy ranges, benchmarks and mandate-specific restrictions.

03 Risk & liquidity

Document concentration limits, liquidity monitoring, escalation triggers and the evidence required for review.

04 Governance & review

Identify committee responsibilities, reporting requirements, approval records and review cadence.

> This sample illustrates a possible document structure. It contains no client information, portfolio results or investment recommendations. The final scope and outputs depend on the agreed mandate.