



Media release

2 December 2024

National Red Cross societies receive CHF 300 000 from the Colin&Cie Social Responsibility Fund

The Colin&Cie customers and the independent wealth manager itself are supporting various national Red Cross societies with this year's payout from the Social Responsibility Fund. The funds will enable important regional projects to be carried out even more comprehensively in 2024/25. The beneficiaries include socially disadvantaged children and young adults as well as elderly and sick people with limited mobility.

Colin&Cie launched its social responsibility initiative in 2029, following a consultation with its customers that highlighted an interest in sustainable investments while taking social responsibility. The cornerstones of its initiative are the Social Responsibility Fund, the active involvement of Colin&Cie's investors and staff, and the collaboration with the Swiss Red Cross (SRC).

Social Responsibility Fund

At the customer's request and adhering to strict criteria, Colin&Cie invests part of the managed assets in ESG (environmental, social and corporate governance). A portion of the fund proceeds are donated to social and sustainable projects run by the Red Cross. So far, more than one million Swiss francs has been invested in various local projects to improve social equality and reduce poverty. The average financial return on the fund over the past three years, without taking distributions into account, has been 6.74% p.a., which is higher than comparable share indices. Colin&Cie CEO Thomas Warnecke is pleased with this double success: "Part of our initiative is not only to produce an attractive financial return for our investors this year, but also to generate a significant social return for society."

Active involvement of investors and staff

One particular feature of the initiative is that customers are sent an annual survey to decide which projects are prioritized. Colin&Cie staff are involved in selecting suitable projects. Some of them also act as project mentors. Their role is to follow the project developments in regular exchanges with the project managers at the Red Cross.

Red Cross projects supported in 2024/25

This year, support is being given to projects run by the Red Cross organizations in the six regions where Colin&Cie has offices. The projects run by the **Zurich** cantonal association focus on assisting young adults with vocational training, helping recognized refugees find training and jobs, and assisting elderly people with housework. The **Zug** and **Ticino** cantonal associations have received funding to organize holiday camps for children from low-income



families. The **Schaffhausen** cantonal association is promoting the integration of unaccompanied underage asylum-seekers by organizing events in which they cook and eat with Junior Red Cross volunteers. Projects in the border region with Luxembourg also receive funding. The **Saarlouis general hospital** run by the German Red Cross (GRC) invests its allocation from this year's funds to improve care for patients with cancer or with chronic open wounds. The **Trier-Saarburg** section of the GRC is using its funds to purchase a transport vehicle to provide rapid assistance for elderly people in emergencies or dangerous situations.

Collaboration with the Swiss Red Cross

Since 2019, the SRC and Colin&Cie have been working on the social responsibility initiative. The signing of the official partnership agreement in January 2024 – the highest partnership form at the SRC – reinforced the close strategic collaboration between the two entities. Elischa Link, a member of the Red Cross Council and the Social Responsibility Fund board, is convinced: “The initiative provides a straightforward way to combine sustainable asset accumulation with social responsibility. The local projects and the close connections between Colin&Cie and the Red Cross managers ensures that the funds are used in accordance with the investors’ wishes.

About the Swiss Red Cross (SRC)

No other relief organization combines such a wide variety of strengths in the health, integration and rescue sectors as the Swiss Red Cross. The SRC comprises 24 cantonal associations along with four rescue organizations, two institutions, and SRC Headquarters. More at www.redcross.ch

About Colin&Cie

Colin&Cie has more than 40 employees in Zurich, Zug, Schaffhausen, Lugano and Luxembourg to serve wealthy private investors in Switzerland and the European Union. Colin&Cie adopts a holistic, goal- and client-oriented advisory approach based on an independent and value-oriented service model. More at www.colin-cie.com

Contacts

Swiss Red Cross
Sabrina Hinder, Communication, sabrina.hinder@redcross.ch
Tel. +41 58 400 42 05

Colin&Cie
Roman Awischus, Communication, roman.awischus@colin-cie.com
Tel. +352 272 135 219

This publication is for information purposes only. The information provided here does not constitute a recommendation or advice. The Social Responsibility Fund is managed by: ETHENEA Independent Investors S.A., Munsbach, Luxembourg. The prospectus and the key



information documents (PRIIPs-KID), articles of association or management regulations, as well as the annual and semi-annual reports, can be obtained free of charge from the fund manager (<https://www.ethenea.com/de-ch/drittfonds/social-responsibility-funds-global-engagement/>) or its representative in Switzerland: IPConcept (Schweiz) AG, Münsterhof 12, CH-8022 Zurich.