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The AMF supports associations, foundations, endowment funds and other non-professional institutional investors in their approach towards investment in financial products

The French Financial Markets Authority (AMF) publishes a guide to help associations, foundations, endowment funds and other non-professional institutional investors to define their investment approach and to make decisions that are best suited to their situation. Covering questions that should be asked, information about intermediaries, explanations of financial products and a clarification of the concept of conflicts of interest, this guide provides key insights for gaining a better understanding of the financial world.

The term "institutional investors" encompasses diverse organisations such as banks, pension funds, associations and religious congregations. These players, who invest in and therefore make a significant contribution to the economy, do not all have the same level of financial knowledge and experience.

The AMF publishes a guide containing information, advice and good practises to help associations, foundations, endowment funds and other non-professional institutional investors determine their approach and carry out their financial investments.

This guide gives a detailed description of the key stages in the investment process – from drawing up the investment decision to choosing the financial intermediaries and right up to

tracking investments. It then defines the different types of investments (funds, shares and bonds) and explains the possible investment methods. Finally, this guide contains information on the concept of conflicts of interest and on the principles of good governance that it is desirable to implement in these organisations.

About the AMF

The AMF is an independent public authority responsible for ensuring that savings invested in financial products are protected, providing investors with adequate information and supervising the orderly operation of markets. Visit our website www.amf-france.org.

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