



Sarah Bates

Current Positions

Sarah is Chairman of Polar Capital Technology Trust plc and Chairman of Merian Global Investors (UK) Limited. She is Non-Executive Director of the Worldwide Healthcare Trust, Chairman of the Investment Panel of St Joseph's Hospice and has a number of other advisory roles.

Background Information

Sarah Bates has an MBA specialising in investment and finance from the London Business School.

She has over 35 years of experience in the investment and investment management sectors. She started life as an analyst with Simon & Coates and worked her way up through Invesco Limited to become joint Chief Investment Officer and Chief Executive of the institutional business in the UK. She has therefore significant experience of institutional investment.

Ms Bates was appointed to several roles from the early 2000s, generally in the investment world.

She was appointed to the Boards of Witan Pacific Investment Trust plc and of JP Morgan American Investment Trust plc, and became Chairman of both, before retiring from both posts in 2017.

Sarah Bates was also Chairman of the Audit Committee of New India Investment Trust, amongst other investment company Board roles.

She was elected to the Board of the Association of Investment Companies in 2006 and elected Chairman in 2011. She was an ex-officio member of the Takeover Panel in that capacity.

Ms Bates was a Non-Executive Director St James's Place Wealth Management from 2004 and chaired the Nomination, Investment and Remuneration Committees. She became Chairman in 2014 a post she held until she retired in October 2018.

In the property world, Ms Bates was appointed a Non-Executive Director of U and I Group plc, and Chair of its Audit Committee (and later SID), and Chairman of a small Russian property company.

Ms Bates has also considerable experience in the pension fund world, including as an external advisor, Chairman of Trustees and a member of pension fund investment committees. She was appointed Chairman of the Cancer Research UK Pension Fund Investment Committee and is now a special member of the USS Investment Committee.

Other Notable Interests

Ms Sarah Bates has been elected a Fellow of the CFA Society of the UK.

Sarah Bates is based in London.