dakota

dakota.com

WEBINAR POST-CALL NOTES

UK Charity Market + International Expansion

November 2026

WHAT'S INCLUDED

- Webinar Overview
- UK Coverage: Where It Started and Where It Is Now
- UK Charities
- The Competitor Map and Why Trustees Matter
- European Sub-Advisory
- What's Coming Next
- Key Takeaways
- Frequently Asked Questions

SPEAKERS

Rob Robertson
President, Dakota Marketplace

James Goodman
Leads International and AI Strategy

WEBINAR OVERVIEW

In this special webinar, Rob Robertson and James Goodman walked through a wave of new UK and European intelligence now in Dakota Marketplace. Rob opened with the story behind it: during Dakota's June trip to London, a longtime customer said the UK charity market is a channel they actively raise assets from, but it is highly fragmented and hard to navigate. Trustees carry a lot of influence over investment decisions, and no database mapped them. They were piecing it together with LinkedIn.

Rob flew home, talked to James and Kizar, and James went after it. James then covered how the team built it, what is live today, and what is landing next. Dakota's team travels to London at least twice a year, and this build came straight out of those meetings.

UK COVERAGE: WHERE IT STARTED AND WHERE IT IS NOW

Before the new builds, Dakota Marketplace already had strong coverage across the UK and Europe: more than 1,500 UK allocator accounts and just under 7,500 contacts, spanning the channels UK fundraisers already work, including wealth managers, family offices, consultants, and banks. What was missing was **intelligence** on the institutional side. Dakota had 163 UK charity accounts but did not know who ran the money, and 98 LGPS funds but holdings for only nine.

3,000+	17,000+	3	3
UK ALLOCATOR ACCOUNTS	UK INVESTMENT DECISION MAKERS	NEW DATASETS	MORE BUILDS SCOPED
up from 1,500+	up from ~7,500	Charities, LGPS, Sub-Advisory	landing in Q4

That jump came from James working with Kizar and Dakota's global 70-plus person data team. The team built both datasets the same way Dakota builds US data: as institutional-grade products drawn from rich, publicly available information.

LIVE

UK Charities

1,600+ charities and endowments mapped, with trustees, managers, and consultants.

LIVE

UK LGPS

Deep intelligence on pension holdings, consultants, and asset allocation, updated in real time.

OCTOBER

European Sub-Advisory

The deepest dataset added in 18 months, covering Ireland and Luxembourg platforms.

What Makes It Intelligence, Not Just a List

- **Decision makers only.** Investment committee chairs, finance directors, CIOs, treasurers, and trustees, each enriched by the data team with role, verified email, and the asset class they cover. No general inquiry inboxes.
- **Read from audited accounts.** Dakota sees who each allocator invests in (the exact funds), the banks holding their cash, the consultants they work with, and their custodians.
- **Filterable on every field.** Slice by manager, consultant, custodian, asset class, and more.

Want to see the UK data for your strategy?
Book a demo and we will walk through UK allocators in Dakota Marketplace live.

Book a Demo →

UK CHARITIES: THE UK'S ANSWER TO US ENDOWMENTS AND FOUNDATIONS

There are roughly 170,000 registered UK charities on the Charity Register. Dakota focused on those with more than £10 million (around $13 million) invested. The register shows how much of each charity's assets sit in cash, how much is set aside for grants, and the number that matters most to fundraisers: how much is invested in funds, across asset classes.

This is the closest thing the UK has to the US endowment and foundation channel, so Dakota gave it the same name. The subtype is **charity**, and every account sits under Endowments and Foundations. All of them hire external managers, whether they are a £10 million charity or a $4 billion one.

1,600+	$234bn+	91%	10,000+
UK CHARITIES AND ENDOWMENTS	COMBINED AUM	NET NEW TO DAKOTA MARKETPLACE	CONTACTS WITH VERIFIED EMAILS

How the Data Stays Current

- **Sourced from each charity's own audited annual accounts.** This is not scraping. Dakota reads the filings on a daily basis.
- **Updated in real time.** Every charity files annually, but a different charity files every single day, so new information flows in throughout the year. It is now an automatic process.
- **Changes are visible.** Dakota sees managers, trustees, and consultants, and when one manager is removed from an allocation and a new one is brought in.

91% of these charities are new to Dakota Marketplace.
See which ones fit your strategy. Book a demo.

Book a Demo →

What You Can See on Each Account

- Trustees, with role, charity email, and asset class covered
- Investment managers and wealth managers on the account
- The consultant mapped to the account
- The exact funds the charity invests in
- The banks holding its cash
- Its custodians

> **Why it took time to get right.** As Rob put it, the foundation is the most important layer. Without the right accounts, the right people, and up-to-date email addresses, nothing else matters. Now that the foundation is in place, Dakota is layering in the intelligence: which managers each allocator holds, and who advises them.

Ready to find your next UK allocator? Book a demo of Dakota Marketplace →

A COMPETITOR MAP, ACCOUNT BY ACCOUNT

James walked through the **Masonic Charitable Foundation**, a $237 million foundation that was not in Dakota Marketplace before. The account shows who it works with: CCLA, a name you will see often across UK charity money, along with Royal London, Sarasin, Thesis, and Waverton.

Three Ways In

- **The trustees themselves,** who make the decisions on which managers to hire.
- **The consultant** Dakota has mapped to the account.
- **The investment manager,** because trustees may have chosen CCLA to manage the assets, but CCLA then makes the investment decisions, perhaps on an advisory basis.

Patterns Across the Channel

- **Charity specialists.** Four firms manage a large share of UK charity assets on a wealth manager or investment manager basis: CCLA, Cazenove, Sarasin, and Rathbones.
- **Consultants.** Of the 100-plus UK charities that have a consultant, Stanhope and Cambridge advise a large share. Mercer (recently renamed Marsh) and Redington also appear, down to the individual field consultant.

> For a fundraiser, whether based in the US or the UK, this is a **competitor map**. You can see which managers are already in the books and, in real time, when one has been removed or a live search is underway.

See the competitor map for your strategy.
Book a demo and we will pull up the UK charities and managers relevant to you.

Book a Demo →

WHY TRUSTEES MATTER

Rob called it a treasure map, and trustees are the heart of it. They are often volunteers with day jobs, and the investment decisions, such as which wealth manager or investment manager runs the charity's assets, are made by them.

- **They meet every quarter, sometimes monthly,** and fund managers and wealth managers pitch to them at those meetings.
- **Dakota has added 10,000 trustee email addresses** over the last few months, so you can reach them directly.
- **Dakota also shows each trustee's day job.** Because the data already existed in Dakota Marketplace, you can see when a trustee is also a CIO or portfolio manager at an asset manager or another allocator.

> **What the outreach looks like:** "We can see that you are a trustee of this charity. We would love to show you our private equity fund and how it fits with your strategy."

Want trustee-level contact data for your next raise? Book a demo →

EUROPEAN SUB-ADVISORY

In Europe, a bank, private bank, or wealth manager will often put its own name on a fund while hiring outside firms to manage it behind the scenes. Around €1 trillion (about $1.05 trillion) is managed this way, and it is similar to the US mutual fund sub-advisory channel.

This one also came out of Rob's London meetings. In a separate conversation, a customer said they had relied heavily on a sub-advisory database that was acquired by a larger company, after which the data went stale very quickly and stopped being useful. James said "I'm on it," and the channel is now mapped, built, and with the data team. **It goes live in Dakota Marketplace this month.**

139	3,000+	713	1,000+
PLATFORMS HIRING EXTERNAL MANAGERS Ireland and Luxembourg	SEATS WORTH $471BN mapped	MANAGER FIRMS	HIRES AND FIRES with dates

- **3,000+ decision makers** at these platforms are mapped, so you know who to contact.
- **Mediolanum (Italy)** has 125 seats across 61 managers. **Waystone** has 322 seats across 170 managers.
- **Updated in real time,** not a one-time upload. You will see when a search opens or a manager is removed, which is the opening for that asset class to pitch.

Raising capital in Europe?
Book a demo and see sub-advisory seats, hires, and fires for yourself.

Book a Demo →

WHAT'S COMING NEXT

- **Family offices.** Dakota just crossed 5,000 global family offices, with more contacts added every day. James noted the UK appears to have just overtaken the US for the most family offices.
- **Solvency II insurers (Q4).** Exposures and key people for every UK and EU insurer, drawn from SFCR reports. This extends Dakota's US insurance product to Europe.
- **UK private pensions (Q4).** Defined benefit and defined contribution schemes, of which there are around 5,000, following the UK public pensions work.
- **Top 100 London accounts refresh.** Dakota is refreshing every contact and detail on the top 100 London accounts, then repeating the exercise across Switzerland, Germany, the Nordics, Benelux, and France.

Tell us what you want built next. Book a demo →

KEY TAKEAWAYS

- UK coverage doubled: **3,000+ allocator accounts** and **17,000+ investment decision makers**, up from 1,500+ and about 7,500.
- **UK Charities is live:** 1,600+ charities and endowments, $234bn+ in AUM, 91% net new to Dakota Marketplace, and 10,000+ contacts with verified emails.
- **Trustees are mapped,** along with the managers, consultants, banks, and custodians each charity uses, all drawn from audited accounts and updated in real time.
- **European Sub-Advisory goes live this month,** with 139 platforms, $471bn in seats, and 1,000+ hires and fires with dates.
- **More is coming in Q4:** Solvency II insurers, UK private pensions, and a refresh of the top 100 London accounts.

See all of it in one demo.
UK Charities, LGPS, Sub-Advisory, and what is coming next.

Book a Demo →

FREQUENTLY ASKED QUESTIONS

How big is the UK charity market in Dakota Marketplace?

Of roughly 170,000 registered UK charities, Dakota mapped the 1,600+ with more than £10 million (around $13 million) invested. Together they hold over $234 billion, and 91% are new to the platform.

Who are the contacts?

Decision makers only: investment committee chairs, finance directors, CIOs, treasurers, and trustees, with role, verified email, and the asset class they cover. There are 10,000+ contacts with verified emails across UK charities. Book a demo →

Is the data scraped? How often is it updated?

It is not scraped. Dakota reads each charity's audited annual accounts on a daily basis, and because a different charity files every day, the data is updated in real time throughout the year.

Can I see which managers and consultants a charity uses?

Yes. Each account shows managers, trustees, consultants, banks, custodians, and the exact funds invested in, and you can filter on any of these fields. You can also see when a manager is removed and a new one is brought in.

What is European sub-advisory and when will it be live?

It covers banks and wealth managers that put their name on a fund but hire outside firms to manage it. Dakota mapped 139 platforms across Ireland and Luxembourg, and the dataset goes live in October.
Book a demo →

What is coming next for the UK and Europe?

Solvency II insurers, UK private pensions (DB and DC), and a refresh of the top 100 London accounts, followed by Switzerland, Germany, the Nordics, Benelux, and France.

dakota

NEXT STEP

See the UK and European data for yourself.

Dakota Marketplace is built by fundraisers for fundraisers: a complete, accurate, and ever-updated database across institutional and intermediary channels in the US and globally. Request a demo and see how we make fundraising easier.

In a demo, you can:

- Search 1,600+ UK charities and endowments, with trustees, managers, and consultants
- Explore UK LGPS holdings and the new European sub-advisory dataset
- Get notified when a prospect or client changes firms or roles
- Stay on top of fundraising news and use Metro Areas to find every qualified prospect in a city you are traveling to, broken out by channel

Book a Demo of Dakota Marketplace →

dakota.com/calendar-international