

ESG Impact Report

Our approach to ESG: Environmental,
Social and Corporate Governance

2024 EDITION



Our ESG Commitment
Working together
for positive change

Our ESG Commitment

Select a topic to explore how we are
working together for positive change.



Our Planet



Changed how we communicate with our clients by embracing online documentation using DocuSign, and minimising printed marketing collateral - making online our default option.



Marketing giveaways changed to sustainable options.



Moved away from paper based business cards and launched electronic business cards.



Moved almost all of our IT servers onto cloud technology.



Implemented 'Autopilot' to enable configuration of devices virtually.



Began tracking utility usage (gas, electric, water and wastewater) to enable us to set targets.



Maintained an electric car scheme benefit for required employees.



Revamped the Weybridge office: installed LED lights, new blinds and sealed windows to prevent drafts.



Digitalised the employee health and safety risk assessment process.



Streamlined our stationary suppliers, opting for sustainable items.



Launched the Digital Tactics Team who collaborate across teams to ensure process efficiency utilising MS PowerApps to its fullest.



Embedded compliance system to enable the department to go paperless.



Encouraged clients to have virtual meetings.



Where face-to-face Secondsight client meetings were requested by multiple clients with offices in close proximity, meetings were scheduled on the same day.



Our People



Selected and built a new Learning Management System and CPD logging tool for launch in 2024.



Received confirmation of budget for a Flex Benefit System.



Built a creative space in Weybridge to enable collaboration.



Conducted an employee Financial Wellbeing Survey which led to the launch of a financial wellbeing policy. Managers were then trained on how to signpost and support struggling employees and employees had access to financial wellbeing coaching sessions.



Embedded the Learning and Development consortium through the recruitment of a Learning and Development Assistant.



Conducted a Training Needs Analysis.



Conducted neurodiversity training with all managers.



Promoted a 30-day fitness challenge and free virtual fitness classes.



Organised 'Have a Break on The Voice' sessions to encourage employee to socialise away from their desks.



Organised a speaker from Galop, the LGBT+ anti-abuse charity, to mark Pride.



Increased awareness of cultural holidays to aid inclusion.



Encouraged cross-collaboration to help employees get involved in the wider business.



Embedded our Partner Growth Academy.



Signed up to the 'Woman in Finance Charter'.



Launched the Kadence App so that employees can easily book desks and view office attendance.



Launched the Microsoft 365 Help Portal to assist with IT queries.



Our Clients



Submitted 14 client facing documents to the Plain English Campaign to be reviewed and crystal marked, removing jargon and helping understanding.



Launched new branding and logos to make it easier for clients to understand our services.



Provided Financial Fitness Fridays at no costs to clients, focusing on relevant financial topics.



Launched a website that is more accessible and inclusive. We incorporated Recite-me; an assistive toolbar that offers features to help users read and understand the content in a way that suits them best. It includes reading aids, a set of styling and customisation tools, an online screen reader, and a translator that can translate text into 100 languages.



More actively promoted integration between our Employee Benefits and Private Wealth propositions, helping bridge the advice gap by offering access to advice and guidance to our corporate clients' employees.



Introduced a templated central report foundation document (suitability letter) used by all advisers and paraplanners. It has been written with the client in mind using font that is dyslexic friendly, and has graphics to illustrate key points.



Embedded Consumer Duty, offering a bespoke service to every client, thanks to 9 months of extensive consultation with our advisers ahead of implementation.



Automated process for investing cash (Trade Automation).



Implemented the Platform 1 Online Withdrawal Process.



Our Community



Promoted and launched our Volunteering Policy, with any completed volunteering time logged on our HR system to enable us to assess positive impact.



Collected foodbank donations for our local foodbank.



Partnered with The Conservation Volunteers, completing a corporate volunteering day at Waye Avenue Open Space.



Donated to the charity 'Voices of Hope' in lieu of client Christmas gifts.



Following a revamp of the Weybridge office, furniture that was no longer required was donated to The Phoenix Cultural Centre in Woking.



13 employees completed the Surrey 5 Peaks Hikeathon, raising £1,767 for the Surrey Care Trust.



Our Corporate Governance



Launched RAG reporting to allow managers to identify operational and business risks



Conducted a review of our Governance structure and enhanced our approach to reviewing Investment Risk



Increased our diversity on the board to enable more effective decision-making



Case Study Community

Volunteering Day

On 22nd September, The community group in our engagement group 'The Voice' organised for a group of employees to volunteer with The Conservation Volunteers at Waye Avenue Allotments, which is run by the local community group [Sunshine of Hounslow](#). The space is used by those feeling isolated in the local area, providing wellbeing support.

Activities included clearing overgrown vegetation, laying matting, painting planters and building a shelf.

The Foster Denovo sustainability policy encourages employees to participate in volunteering events organised by The Voice or personal initiatives, appreciating that volunteering can help employees learn new skills and improve wellbeing. Employees may also use the skills they have developed at work to help the local community.

Employees can volunteer for any organisation registered as a charity in the UK which demonstrates positive, social, or environmental benefit.



Case Study Social

Women in finance

The financial services industry is traditionally male-dominated, but times are changing, and we're delighted to be part of a group at the forefront of that progression.

Therefore, in a bid to raise awareness of this initiative, on March 8th 2023, we launched our Woman In Finance campaign. The campaign consists of a series of light-hearted blogs showcasing the stories of women across our business and their careers in financial services.

At Foster Denovo, 50% of our workforce are women, which is higher than the industry average of 43%. In addition, 38% of our senior management team are women, higher than the industry average of 20%.

The blogs are hosted on the Foster Denovo website and have been shared across our social media channels. Our Head of Talent Acquisition, Helena Bogdanovski, also promoted these blogs via videos to her LinkedIn audience.



Case Study Enviroment and Social

Redesign of the Weybridge Office


In 2023, following the implementation of the Dynamic Working Policy, we conducted a revamp of our Weybridge office to enable the space to be better utilised by employees adopting a hybrid working approach.

New blinds and LED lights were installed, all desks were moved upstairs, and hot desking was launched to enable cross team collaboration, with employees able to book desks via a new online booking system, Kadence.

Downstairs was reconfigured to be an open plan space for internal team catch ups and meetings requiring creativity.

Any furniture that was no longer required was donated to The Phoenix Cultural Centre in Woking.





Case Study Enviroment



DocuSign

In 2023 we continued our journey to becoming paperless by using DocuSign to allow clients, employees, and partners to electronically receive and sign documents.

The project helped us to reduce carbon emissions, conserve water, save wood and eliminate waste.

In 2023 our environmental savings equated to:

- 8,012 lb of carbon emissions reduced
- 10,051 gallons of water conserved
- 3,413 of wood saved
- 554 lb of waste eliminated

This compares to:

- Skipping 7 loads of laundry.
 - Conserving 10 trees.
 - Saving 64,916 pages of paper.
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