

ESG Impact Report

Our approach to ESG: Environmental,
Social and Corporate Governance

2025 EDITION

OUR PLANET

OUR PEOPLE

OUR CLIENTS

OUR COMMUNITY

OUR CORPORATE GOVERNANCE



Our ESG Commitment
Working together
for positive change

START



Our ESG Commitment

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



[Our case studies](#) >



Our Planet



Set up a **sustainable marketplace** on our intranet with eco-friendly and sustainable product suggestions.



Merged our Newcastle offices into one 'hub' reducing our environmental footprint.



Launched Foster Denovo branded **reusable coffee cups** to encourage employees to ditch disposable alternatives.



Teamed up with **Wrap UK** to put on a Lunch and Learn for employees to learn about reducing waste.



Promoted **Plastic Free July** and **Second Hand September** highlighting some useful tips employees could take to make a difference.



Sold **recyclable Christmas wrapping paper** to promote a more sustainable Christmas.



Influenced the companies that we acquired to **move across to digital processes**.



Continued to embed **DocuSign** in all of our processes.



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Our People



Received **Platinum Investors in People** accreditation when re-assessed - highlighting our commitment to leading, supporting and developing our people.



Launched 'Gymflex' benefit, enabling employees to get discounted gym memberships, encouraging healthier living.



Launched our **Learning Management System** 'The Campus' which has hundreds of modules available to all employees, embedding a learning culture across the organisation.



Launched **Carer's Policy** to ensure that employees with caring responsibilities know how we can support them.



Launched **Enhanced Parental Leave Pay** to improve the financial wellbeing of those taking time off to grow their families.



Continued to hold 'Have a break on **The Voice**' events to encourage people to take a break from their desks with their colleagues.



Launched a **neurodiversity guide** to signpost employees and managers to support available for neurodivergent employees, in conjunction with Neurodiversity Awareness Week.



Promoted discounted **flu jobs** for employees during flu season.



Promoted Canada Life's **on demand dentist app** 'Toothfairy' providing instant access to advice, guidance and prescriptions.



Opened up our **Share in Success programme** to new employees and partners who hadn't already had the chance to subscribe to Growth Shares, enabling them to also share in the value our growth journey will create.



Partnered with Unum to hold a **Lunch and Learn** on the most common types of neurodivergence to celebrate ADHD Awareness month and Dyslexia Awareness Week.



Promoted **religious events** to embed inclusivity including Eid, Passover and World Humanist Day.



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Our People (continued)



Refreshed our **Diversity, Equity and Inclusion Policy** to reflect the work that our engagement group The Voice do.



Celebrated **International Women's Day** encouraging employees to share stories of inspirational women in their life at a remote luncheon.



Partnered with '**Show Racism The Red Card**' to hold lunch and learns on Bias and Microaggression in the Workplace and took part in their annual Wear Red Day event.



Partnered with '**The Worst Girl Gang Ever**' to host a lunch and learn session during Baby Loss Awareness Week, focusing on how to support individuals who have experienced baby loss or infertility challenges.



Partnered with the **Mosaic LGBT+ Young persons trust** to promote Pride Month and what it represents.



Encouraged employees to take part in a **May Step Challenge** and **Fitness classes** to improve physical activity and support wellbeing.



Launched a brand new **management training programme** for new and upcoming managers, using a combination of self-led training modules on The Campus and interactive sessions with other colleagues.



Launched a **virtual book club**, enabling those who are based remotely to have access to non-work-related social events.



Partnered with '**See Her Thrive**' to raise awareness of how menopause and PMDD can impact wellbeing, and promote our menopause support initiatives.



Held a '**getting comfortable with change webinar**' to help employees manage change in both their work and personal lives, to aid professional development and mental resilience.



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Our Clients



We piloted our **Personal Finance Portal (PFP)** which allows employees to go to one place to view their plans and investments, update attitudes to risk and message us securely.



We developed and piloted our digital advice proposition **MyAdvicePlace**, which is designed to make financial advice more accessible to individuals who would not find value in our core proposition.



We conducted free **Financial Fitness Friday** webinars on 'How to immediately improve your financial wellbeing' and the 'Autumn Budget'.



We piloted **Evie**, an AI programme which aids in transparency with clients, capturing exactly what was discussed in their meetings. This will be ready for launch in 2025.



We refreshed our **vulnerable client training** for employees to ensure fair treatment of vulnerable clients.



We launched our **Clearview portal** making access to data and personal information much easier for clients.



We piloted **Money Mentors Network** which offers free advice to individuals with the aim to address financial anxiety by equipping them with the knowledge, reassurance, and confidence to take control of their finances and make more informed decisions.



Our marketing team launched **Hubspot** which allows us to send bespoke communications to clients, ensuring the emails they are receiving are in line with their needs.



We continued to drive integration between our Employee Benefit and Private Wealth propositions, helping **bridge the advice gap** by offering employees of our corporate clients access to advice and guidance. During 2024, 178 employees converted to a Private Wealth client from 635 seen; a conversion of 28%.



After embedding consumer duty, which ensures we are offering bespoke advice to individual clients, tailored to their needs and wants, our Private Wealth **NPS score has been +83** and 80% of clients recognise us as "effortless" to work with on the Client Effort Score (easy to do business with).



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Our Community



Employees took **21 paid volunteering days** across the year.



Launched a **volunteering hub** on our intranet so employees could find volunteering opportunities.



Our Newcastle office **walked 18 miles along Pennine Way** to raise **£1000 for an office defibrillator** which can be accessed by the public.



Employees took part in the Thames path walking challenge raising **£575 for CALM**.



Held coffee mornings raising **£130 for Macmillan Cancer Support**.



Held a bake sale raising **£385 for Show Racism the Red Card**.



Raised **£630 for Crisis at Christmas** through our Christmas raffle and donations.



Our Weybridge office **donated food to Runnymede food bank** to help those in need.



Our IT department made a **donation of refurbished computers** to a school in Ghana.



Our Edinburgh office organised a collection to support **Edinburgh Food Project**.



[Read about our community work](#)



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Our Corporate Governance



-  Engaged an external Company Secretariat service.
-  Refreshed Board meeting structure to ensure the right focus in each of FDG, FDL and Board Risk Committee for the growing business.
-  Maintained and enhanced risk monitoring RAG reports.
-  Appointed Group Chief Financial Officer, a new and additional role to FD.



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Case Study People (Community)



Volunteering Day

We encourage employees to volunteer within their local community either through volunteering events organised by The Voice or personally organised 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.

In 2024 employees took 21 days off to volunteer! Employees received full pay for these days.

One of the days included several members of the SecondSight team spending a day volunteering for that charity Harry's HAT. The charity hosted a garden party at Lambeth Palace to raise awareness of their Get-A-Head campaign. The campaign advocated for regular head circumference measurements during infancy to help with the early detection of hydrocephalus. The SecondSight team were integral to the day running smoothly. They worked incredibly hard in the heat, taking payments from guests entering the event, selling charity merchandise, and helping with the event set-up and take-down.

Harry's HAT managed to raise an incredible £4,166.86 on the day, and the team were a massive driver of this.



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Case Study Planet & People (Employees)



'Have a Break on the Voice' and our reusable cups

In 2024, we proudly launched our Foster Denovo-branded reusable coffee cups as part of our commitment to reducing single-use plastics.

To encourage adoption, we integrated the cups into our quarterly 'Have a Break on the Voice' events, which provide a fun and relaxed opportunity for employees to step away from their desks.

During these events, employees enjoyed a free drink of their choice while socialising with colleagues, promoting both sustainability and wellbeing across the organisation.



THE VOICE

EQUALITY & DIVERSITY | SOCIAL | COMMUNITY & WELLBEING | ENVIRONMENTAL



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Case Study People (Employees)



Launch of our Learning Management System: The Campus

In 2024 we partnered with Redmill to launch our brand-new Learning Management System – The Campus. This hosts hundreds of interactive online learning modules which are available to all employees including training on soft skills and behaviours, compliance, cyber security, leadership, wellbeing and there is also CII and CISI exam preparation content available.

Having the training online makes it more accessible for employees, allowing them to complete training from anywhere at anytime.

Knowing that not everyone learns in the same way, there is a wide range of learning media including access workbooks, videos, e-learning, classroom wash-up videos and forums.

Employees can also log their CPD so they can see how much they have completed over the year.

This will allow us to fully embed a learning culture across the organisation!



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Case Study People (Employees)



Investors in People Platinum

In 2024 we were reassessed by Investors In People. Investors in People is an internationally recognised standard that sets out the requirements for successful organisational management and people development.

We achieved bronze accreditation in 2015, silver in 2018 and gold in 2021, but in 2024 we achieved the highest award possible – Platinum! Only two per cent of the 55,000 businesses across the globe who applied have reached this standard.

Despite receiving the highest accreditation, we are committed to continue working through the framework to ensure we continuously improve our people development strategy and invest in our people!



INVESTORS IN PEOPLE®
We invest in people Platinum



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About us

We are a multi-award-winning national firm of financial advisers. We provide specialist financial advice, services and investment solutions for individuals and their families, businesses and charities.

You can feel confident working with us as:

- We have won more than 30 prestigious industry awards, and we've also been recognised by Investors in People, achieving Platinum accreditation - its highest level;
- You can trust us for innovative solutions; and
- Our Net Promoter Score (NPS) revealed that our clients rate us as +80 and 83% say we are, 'easy to do business with'.

INVESTORS IN PEOPLE
We invest in people Platinum

Contact us

If you'd like to find out more about anything highlighted in this brochure, please contact us:

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