



## Contact us

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## EdenTree's Commitment to Diversity & Inclusion



The value of an investment and the income from it may go down as well as up and the investor may not get back the amount invested.



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## Our guiding belief

**At EdenTree we are committed to Diversity & Inclusion. Not only do we feel that a responsible business like ours must champion diversity, but we proactively seek out a diverse range of thought, experience and background, bringing greater value-add to our clients and business. We also pride ourselves on the inclusive culture we have co-created and are mindful that it takes the whole business to ensure this develops and lives on.**

**We uphold the Equality Act 2010, valuing all protected traits, and strive for an inclusive, fair workplace.**

**Andy Clark**, CEO and EdenTree partner with Alice Dearing, Olympian and Co-Founder of the Black Swimming Association

**Andy Clark**  
CEO

“EdenTree's inclusive culture and commitment to diversity and inclusion is something I'm incredibly proud of. It's not just a lot of activity, it's who we are and feeds back to our purpose of building a better tomorrow, for our clients and the communities supported by our charitable owner. For EdenTree, driving meaningful progress in this area means harnessing the strong commitment from the senior management team, role modelling from our champions, working in partnership with inspiring individuals like Alice Dearing and empowering our people to be the change. We acknowledge that the work here is never done, it's always evolving and changing but our purpose keeps us driven and honest, and we're delighted to share our journey and ambitions with you here.”



## Our journey so far

Our Corporate Responsibility Committee consists of passionate volunteers across the business, including four colleagues that act as Diversity & Inclusion champions. Alongside sharing their unique lived experiences, committee members stay curious about the different experiences and needs of colleagues. Responsibilities include organising internal cultural awareness days, coffee and chat drop-in sessions and oversight of our employee surveys. Some of the initiatives we have championed or honoured include Pride Month, Mental Health Awareness Month, Autism Awareness, Black History Month, World Suicide Prevention Day, International Women's Day and Men's Mental Health.

### Spotlight: Black History Month panel event

To honour the national theme for Black History Month, 'Celebrating our Sisters', we invited colleagues to a lunchtime panel discussion, chaired by Diversity & Inclusion committee member Jay Husbands-Alexander, to hear from a panel of black women discussing their experiences in the business and charity sectors.



**Jay Husbands-Alexander**  
Presentation Production Specialist

“When organising our Black History Month Panel Discussion ‘Women of Impact: Navigating Success and Giving Back’ I aimed to foster dialogue and promote diversity within our professional community. As a dedicated member of the committee, I continue to advocate for inclusivity and meaningful conversations that resonate beyond the event, contributing to a more vibrant and equitable workplace.”



“Your dedication to creating a space for learning, reflection, and dialogue is commendable, and I am grateful to have been part of the event.”

**Panellist Leonore Lord-Patterson**  
Director at True Measure

### Accountability and oversight

Diversity and Inclusion efforts are led by HR and members of the Corporate Responsibility Committee, with ultimate oversight and commitment from the CEO and Executive Committee (ExCo). Two ExCo members also act as sponsors for our work, supporting our Corporate Responsibility Committee and championing local initiatives to drive progress.

# Partnerships

Alongside our internal Diversity & Inclusion initiatives that support and engage our small team, EdenTree is taking active measures to broaden our talent pool and has partnered with a number of specialist firms and charitable organisations. These organisations are supporting us in a number of ways, including helping us to amend our job descriptions, recruit interns and full-time staff, offering training and raising awareness in our industry.

The organisations we are currently partnered with include:



The Benefact Group is also a founding member of the 30% Club and the Women in Finance Charter, a pledge for gender balance across financial services. EdenTree CEO Andy Clark acts as Executive Sponsor of the Women in Finance Charter for the Benefact Group.



**Jonathan Whyte**  
Investment Operations Trainee

“ Thanks to my involvement with Investment 20/20, I have been afforded the invaluable opportunity to serve as an Investment Operations Trainee at EdenTree. This role has served as a conduit for my exposure to diverse skill sets and career avenues within the organisation, fostering significant personal and professional growth. Interacting with seasoned professionals boasting extensive experience has proven immensely enriching, as their insights and knowledge have been generously imparted to me. I am indebted to EdenTree for providing a nurturing environment that fulfils my professional aspirations, and I am honoured to contribute to the company’s journey. ”



**Amos Dadzie**  
Investment Operations Manager

“ At EdenTree we believe in nurturing talent and embracing fresh perspectives. Our active engagement with Investment 20/20 has helped us achieve this. Through their selection process, we identified numerous promising candidates for our Investment Operations Trainee role, among whom we selected an individual relatively new to the finance industry. Jonathan exhibited an eagerness to learn and develop, embracing guidance and support from our seasoned team members. Since joining, his presence has brought a fresh perspective to the team. This experience underscores the invaluable role Investment 20/20 play in reshaping and diversifying our industry. It highlights the potential of nurturing talent, irrespective of prior experience, and underscores the importance of mentorship and support in fostering growth and innovation within our organisation. ”

INVEST/MENT  
20/20



# Culture in Action

## Building an inclusive culture

EdenTree recently embarked on a journey to create a blueprint of Purpose and Values that is unique to us, feels authentic and excites our people. To deliver this, we worked with a team of experts at Kin&Co, alongside a diverse and representative group of colleagues to form an 'Ignition Squad', whose collective efforts ensured that our work represented the authentic voice and sentiment of our people. After 100+ touchpoints with employees in listening and co-creation, Kin&Co delivered a Purpose that reflects the impact of EdenTree today and in the future.

Diversity of perspectives and inclusion run throughout these values and is key to actively pursuing our purpose and ensuring it lives on. During our monthly all company meetings, we share 'culture in action' case studies, highlighting positive examples of colleagues demonstrating our values. We also collectively acknowledge that there is no place here for bullying and harassment and we make sure our policies are fully supportive of that.

## Our purpose

We transform the way people invest to build a better tomorrow

## Our values



**Bold and brave**



**Back each other**



**Own it**

## Engaging colleagues in the recruitment process

As part of our enhanced recruitment strategy, to attract diverse talent to EdenTree, we have introduced a mandatory interview with two members of the Corporate Responsibility Committee. This has proved highly beneficial, creating greater psychological safety in the recruitment process, with colleagues exemplifying the culture at EdenTree and showcasing the range of support available. This enables prospective employees to reflect on EdenTree as a whole, in terms of our culture and commitment to people and planet as well as the role being discussed. If, during the recruitment process, the needs of the individual aren't represented, we are always open to starting the conversation and acknowledge it is a continuous journey of learning and development.

# Targets & Measurement

## Diversity & Inclusion data

We recognise that every individual plays an important role in driving change and cultural progress, harnessing lived experiences and supporting one another. In order to better understand the makeup and needs of our workforce, we issue a Diversity & Inclusion survey every two years, alongside internal inclusion 'check in' surveys. Alongside reporting our demographic data to clients and industry bodies, we group colleagues' comments into themes and take a 'you said: we will' approach to sharing that feedback. This supports our transparency, ensures colleagues feel their ideas and feedback are taken seriously, and helps to shape our strategy and targets.

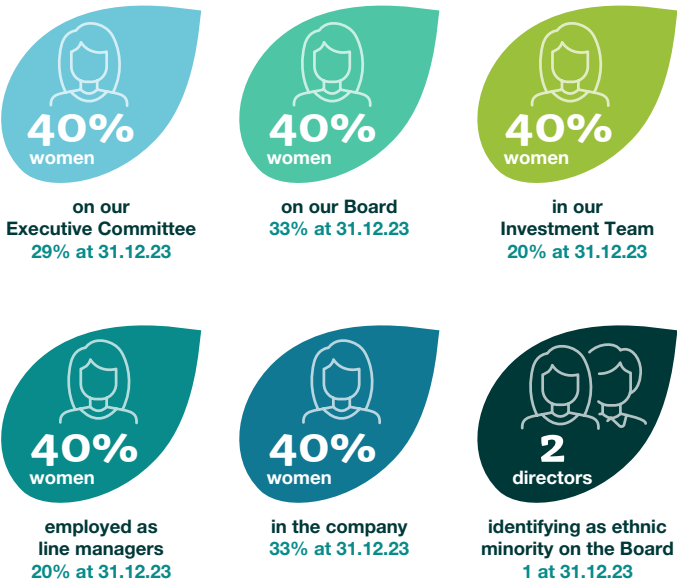
## Targets

We are a small business with ambitious goals. We have spent the past year building out our Diversity & Inclusion strategy, engaging with a wide variety of specialists in areas such as gender diversity, ethnic diversity, social equality and neurodiversity.

We are striving towards an EdenTree that is reflective of the communities we serve and, alongside setting targets, are looking into how we can remove barriers for people at different stages of the process. Initiatives such as Investment 20/20, We Can Be and The Girls' Network help support this, and we will continue to look into initiatives and partnerships that identify the structural inequalities that exist and the means of overcoming them.

Here we outline the goals we have set ourselves to drive progress, aligning ourselves with the goals of the Women in Finance Charter.

## By 2027 our ambitions are:



We are also committed to setting ambitious targets to improve the ethnic and socio-economic diversity within EdenTree and are currently actively engaging in listening initiatives to gain a deeper understanding of the diverse demographics of the communities we serve. We aim to create a more inclusive environment that reflects the diversity of our communities and ensures that every voice is heard and valued.

We will monitor progress towards these targets at least annually.



Vaida Gapsyte  
Head of HR

“ Alongside our long-term targets and ambitions, we continue to drive meaningful progress in the short term. This includes fostering our inclusive culture and working with the Corporate Responsibility Committee to organise initiatives that will engage the business and create a sense of belonging. All these efforts seek to ensure a positive lived experience for colleagues and the roles we are recruiting for. We are also working hard to develop a strong pipeline of future talent, both internally and externally, by seeking to unblock the barriers that may exist at different stages of the career pipeline and journey. ”

Industry engagement

EdenTree is proud to be one of the first 50 signatories of the ACT Standard of Corporate Culture for Investment Companies, a new framework launched to create cultural change and enable professional fund buyers to drive a movement towards more diverse, equitable and inclusive firms. For more information on this global standard: [Investors ACT](#). We also act as representatives on the Investment Association’s Advisory Group for 2024 EDI Data Survey.



Charlie Thomas  
CIO

“ For over 30 years, EdenTree has developed comprehensive standards and expectations across social, environmental and governance factors of the businesses we invest in; holding those businesses to account. We apply those same rigorous standards to ourselves. We are pleased to support City Hives’s ACT framework and see this as a key moment for our industry to embrace transparency, drive progress and, alongside disclosures such as SDR, bring greater clarity to the market. ”



A Mutual Expectation

We seek to equip colleagues with the tools and resources to be engaged inclusion champions and allies. We offer support, time and training as well as a generous learning and development personal budget. In return, we welcome a high level of engagement in contributing to our positive corporate culture, whether big or small in scale and expect colleagues to support our Purpose and exhibit our Values and Behaviours.



July 2024