

# OUR CULTURE & VALUES



EdenTree's history stretches back over a century. Although much has changed in that time, our pursuit of 'profits with principles' has not.

The way we do business, 'our culture & values,' lie at the heart of who we are.

## Our Business

We are a UK based investment manager; that is all we do on behalf of customers and clients. Our business strategy is to be the investment manager of choice for our customers and to be the 'Best Ethical Investment Provider'. Our focus is the long-term. We are not interested in short-term fads and fashion, or in pursuing short-term performance at the expense of long-term stewardship.

We are pioneers of ethical and responsible investment in the UK, launching one of the first ethical retail funds in the UK – our Amity UK Fund – as long ago as 1988. With over 30 years in the ethical and responsible investment marketplace, our business is focused on delivering 'Profit with Principles' for all of our customers who choose us as their investment partner.

Our values are strongly focused on delivering great service for customers; an engaged, rewarding workplace for our people; and to be seen as a force for good in the wider business community and society.

## Our Values

- Trust – trusted by customers to be the manager of choice for their investments
- Responsibility/Ownership – conducting ourselves and our business to the highest standards, customers are at the heart of what we do
- Collaboration – creating value for customers in order to deliver 'Profit with Principles'
- Inclusion - our people are committed to the principles and ethics that drive EdenTree

## Our Customers

We want to be 'The First Choice for Customers and Business Partners'. Our customers and clients are at the heart of what we do, and we never forget that they have a choice. Our aim is to provide a compelling and differentiated investment management proposition that puts customers and clients first, striving always to be the most respected and trusted investment manager of our customers' money.



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To do this, we focus on helping customers and clients meet their investment objectives through our 'Profit with Principles' philosophy of achieving good long-term performance delivered in a responsible and ethical way.

## Our People

Our people are fundamental to the aim of being the most respected and trusted manager of customer and client money.

Behaviours are therefore central to delivering on this objective for customers. We are an equal opportunities employer, seeking to recruit skilled and motivated individuals who align personally to the business's values and culture. We expect and encourage the highest standards of professional behaviour and integrity from our people as we believe *how* we achieve results for customers and clients is as important as the results themselves.

We seek to create a collaborative, inspiring and team-focused workplace that emphasises a high-performing and efficient response to customer needs. We develop, train and empower people in order to deliver these values in an efficient and professional way for customers and clients.

How we treat each other is therefore important; we do this with respect, dignity and courtesy in accordance with the values and culture of the business. We encourage a high level of engagement from everyone in the business so as to deliver for customers.

EdenTree is an equal opportunities employer, committed to an appropriate life-work balance and a fair reward structure. The mutual contract between our people and the business is reflected in the high standard of personal and professional conduct expected from everyone.

Our reward structure is designed to support a strategy of 'Achieving More Together' so that we can attract, motivate and retain skilled people aligned to our values and which encourage the right business behaviours.

Together, we support the House investment philosophy and process and work collaboratively to deliver it.

## Our Community

Our business supports the investment aspirations and needs of our customers who may come from a range of diverse backgrounds. We are an inclusive business that puts all customers first and treats everyone equally.

Operating from and within the City of London we are also cognisant of the wider community that surrounds us and the aspirations of those from more marginalised backgrounds in neighbouring areas.



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The EdenTree Community Fund, which we launched in October 2017 is a three-year commitment to make a difference in our community. Targeting the health and wellbeing of young people, particularly girls and young women, we worked with the London Community Foundation to identify two partners of choice for our £150,000 Fund.

We are delighted to be supporting two projects:

Futures Theatre will receive our flagship grant of £40,000 a year for three years to develop a theatre piece performed in schools exploring modern issues that affect young people and which place particular pressure on girls. Performed by professional actors, the piece then involves groups of students in a lively workshop examining how the scenarios could have played out differently. EdenTree funding will allow the piece to be performed to over 4,000 London students each year.

A one-year grant of £10,000 has been awarded to Street Talk, a small London based charity that works with some of the most vulnerable women in society, and specifically those that have been caught up in trafficking, or have been traumatised into prostitution. EdenTree funding will allow Street Talk to provide intensive counselling for 30 women through conventional and art therapy.

## Our Environment

We operate from a single office location within the City of London and our environmental impacts are relatively small. Nevertheless as a responsible business, we seek to manage those environmental impacts under our control in a responsible and efficient way.

Our whole business driver is responsible investment, and we seek to 'engage for change' with the businesses in which we invest on behalf of customers and clients in order to effect better business over time and to influence business behaviour in the areas of environmental, social and governance risk.

## Our Ownership

We are part of the Ecclesiastical Insurance Group, founded in 1887, which in turn is wholly owned by the Allchurches Trust Limited, a registered UK charity. Our charitable ownership structure is an important part of what makes us different as a financial services company, emphasising our values led approach in which all of our distributable profits go to good causes. Ecclesiastical's purpose is to contribute to the greater good of society via its portfolio of businesses, together becoming the most trusted and ethical specialist financial services group delivering £100m to charity.

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