



# Purpose & Values

In January 2024, EdenTree embarked on a journey to create a blueprint of Purpose and Values that is unique to us, feels authentic and excites our people. The goal was to build a new collective identity that truly reflects the perspectives and experiences of people across the business.

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. We also worked together to co-create a corresponding set of Values and Behaviours that both drives our Purpose and defines our culture.

## Our purpose

### We transform the way people invest to build a better tomorrow

## Our values



**Bold and brave**



**Back each other**



**Own it**



“As a responsible business, EdenTree views our healthy corporate culture as an employee and client interest. We are proud signatories of the investment industry standard ‘ACT: Action, Challenge, Transparency’ and, with everything we do, want to ensure we are holding ourselves to higher standards. Working with Kin&Co to capture the voices of everyone in the business to create a new cultural blueprint was critical to the success of this project. Our newly articulated Purpose and Values reflect the EdenTree we are now, and what we will continue to strive to be. We are stewards of capital, investing in businesses that are helping to build a better tomorrow with a charitable owner equally dedicated to transforming and bettering lives. These are so much more than words; they are the very reason EdenTree exists and the impact we seek to make on the world.”

**Andy Clark, CEO**

Proudly part of the **BENEFACT GROUP** 

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