



Mindful Recruitment for People & the Planet

Impact Report 2023/4

Certified



Corporation



We are more than just a recruitment company, we aim to use our platform to help spread the word of B Corp by leading by example.

Putting the planet, our people and the people we serve at the forefront of what we do.

Our mission...

**Make financial planning
a force for good through
recruitment**



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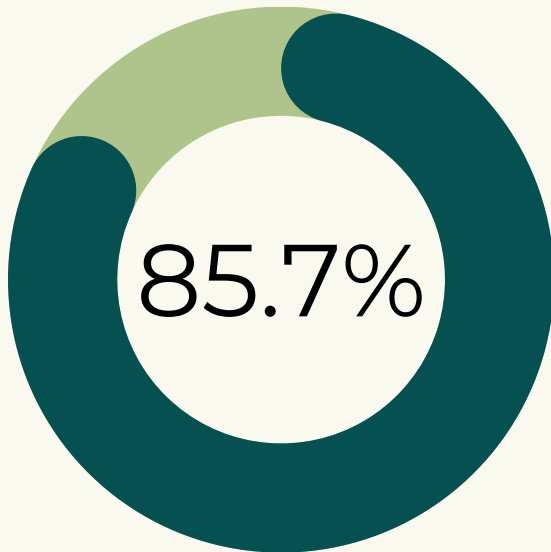


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Our Certification

in May 2023, we became a very proud B Corp certified company, completing with a score of 85.7

Verified:



Since our certification, we have continued to look into different aspects of the company, align our values with other B Corp financial planning companies and set high expectations for ourselves to become a more sustainable business.

This report aims to display what we have done since our certification, and a glimpse into what the next year will look like.

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Governance

We aim to achieve a 100% transparency policy with all employees within the company. From quarterly updates to impact reports, its a chance for all employees to have their say.

1 Profit and loss transparency



2 Social and environmental tracking



3 Company wide accountability tracking for individuals



What's next?

We aim to continue to demonstrate a transparency between company finances and employees throughout 2024.



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Workers

Our greatest asset is our dedicated team. That's why we're committed to offering more than just financial benefits. We prioritise well-being —body and mind. From competitive compensation to initiatives promoting mental and physical health, we believe in fostering an environment where transparency is not just a value, but our daily practise.

- 1** Reviewed & updated our benefits package
- 2** Wellness March incentive for employee health and wellbeing
- 3** Reviewed & updated our working structure to comply with employee lifestyles
- 4** Check-in lunch on us for employees mental health and general wellbeing
- 5** Anonymous quarterly employee satisfaction surveys
- 6** Training in Carbon Literacy & Diversity & Inclusion



What's next?

We intend to review and improve our maternity/paternity policy & make our pensions more ethical



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Community

better business
act

is a business-led campaign supported by us and over 2000 other UK businesses.



We intend to be a thought leader within the financial planning space. This means we must lead by example. Along with our long list of community contributions, projects and initiatives, here are some of the highlights of the year:

- 1** Director on the board of Trustees for the men's mental health Charity Talk Club
- 2** Make Financial Planning a Force for Good - March podcast campaign for financial planning B Corp's
- 3** Company fundraiser: Cycling 100km for Suicide Prevention
- 4** 4 paid hours per month of employee volunteering
- 5** Group volunteering in our local community
- 6** 12 days of Mindful Christmas challenge: To challenge employees and influence others to give over the festive season



Charitable donations:

£5,724

What's next?

After designating the organisation of volunteer work to a team of people, we intend to increase our hours in 2024



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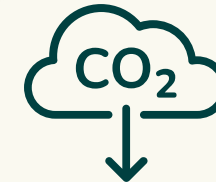
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Environment

As a recruitment business, we have looked at areas we felt could be negatively impacting the planet and where we could put our time, energy and money to help environmental issues.

- 1** We have partnered with Ecologi to fund 4,050 trees and 24 global projects to reduce CO₂ emissions
- 2** Supported the prevention of 268.83 tCO₂e from being emitted through 24 verified carbon avoidance projects.
- 3** Deliver quarterly Carbon Literacy training to all employees
- 4** Sustainably dispose or recycle all our office tech
- 5** Collect individual carbon footprint data, setting targets to reduce as a collective
- 6** Our data is stored on a data centre which has been carbon neutral since 2012 & run on 60% renewable energy



Trees Funded:
4,050

What's next?

Take steps to review and make our website more sustainable and begin to remove carbon from our atmosphere, as well as avoid it



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Customers

There is no denying that the financial planning profession is predominantly male, in fact, according to the FCA, only 16% of advisers in the UK are women! This is one of the many reasons we have built the Financial Planner Life podcast, to bring to life the stories of everyone within financial planning and inspire more people to join the profession. Making it accessible to all, no matter what their background or differing circumstance.

Here are some milestones we have covered this year in order to encourage, inspire and help our customers:

- 1** Created the Financial Planner Life Academy - an affordable and flexible academy accessible to anyone looking to get into the profession
- 2** Setting up Talk Clubs for the men within financial planning to join and focus on their mental health
- 3** Following a meticulous and detailed duty of care for our candidates and clients
- 4** Quarterly training sessions to all our employees to ensure they are providing the best possible service to all candidates and clients
- 5** We were recognised for our impact we have had on the financial planning profession became winners of the 2023 Next Gen podcast of the year award



FINANCIAL
PLANNER
LIFE
ACADEMY



What's next?

Review and improve our process around customer satisfaction and feedback



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Here's to another year of mindful recruitment for people and the planet

<https://recruitukltd.co.uk/>