

Let's take
a look



First Wealth Culture Deck

FIRST WEALTH®

**Our mission gives us energy;
to change the perception of
financial services in the UK forever.**

Smells like entrepreneurial → spirit

We bring the same entrepreneurial energy to improving our culture as we do to improving our service.



Not just a buzzword...
it truly means something →

Wellbeing

We are committed to supporting our team's wellbeing
and to create a great work life balance for everyone.

What our team say...

Having flexible working allows me to take my young children to school and collect them, I can also take additional time off during school holidays to ease our extra childcare demands.

My children will only be young once and I want to make the most of that time as much as possible.

Zoe Raynsford

Head of Back Office Support



A detailed illustration of a pirate ship, the 'First Wealth', flying over a city at night. The ship is a three-masted vessel with dark sails and a skull and crossbones on its side. It has several lanterns on its rigging and a large skull on its hull. The ship is flying over a city with a prominent clock tower and other buildings. A large, full moon is in the sky, and the scene is filled with stars and a blue-green glow.

#BEMOREPIRATE

FIRST WEALTH®

Welcome aboard the pirate ship



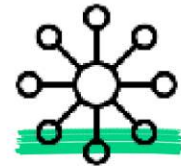
Rebel

Drawing strength by
standing up to the
status quo



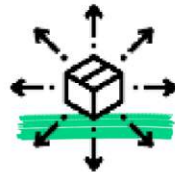
Re-write

Innovate, challenge
and change the rules



Re-organise

Collaborate to
achieve scale



Re-distribute

Fight for fairness, share
power and make an
enemy of exploitation



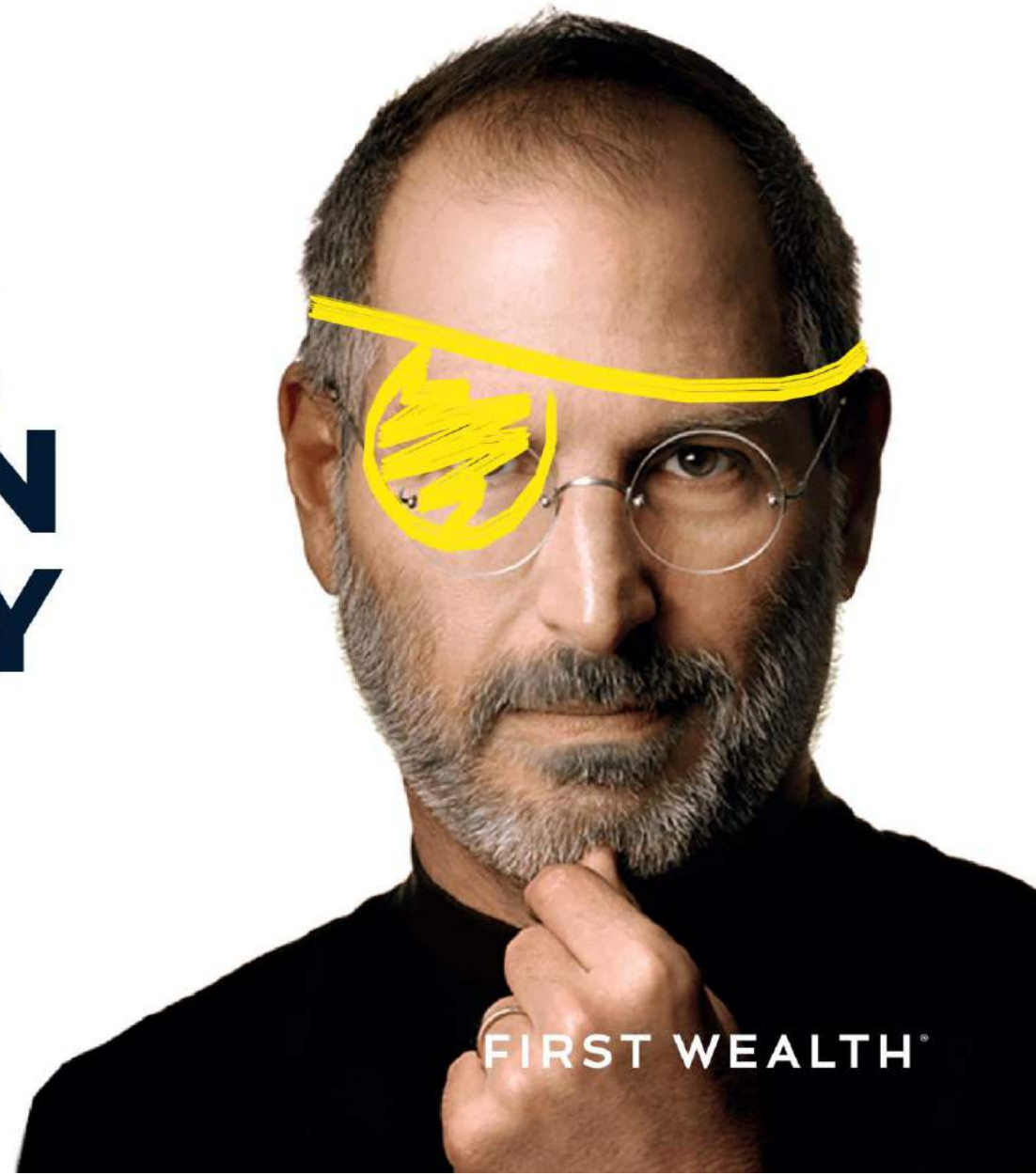
Re-tell

Weaponise our story

**I'D RATHER BE
A PIRATE THAN
JOIN THE NAVY**

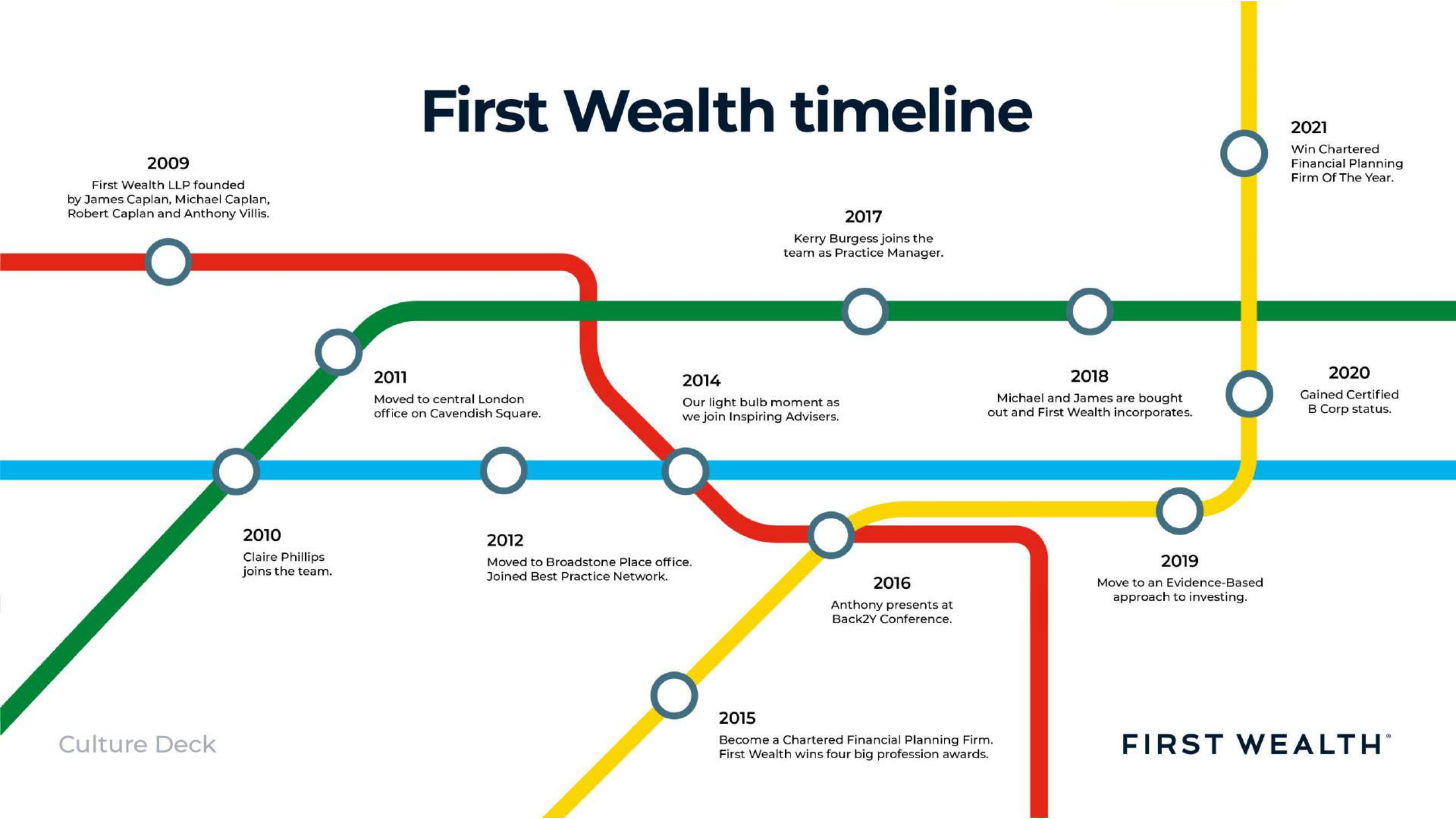
STEVE JOBS

Culture Deck



FIRST WEALTH®

First Wealth timeline



Culture Deck

FIRST WEALTH®

Words to live and do business by

- **Respect**
- **Excellence**
- **Helping others**
- **Happy people**
- **Ambition**

Respect others, be humble

01.

Understand the huge trust and confidence our clients put in us in dealing with their finances

02.

Two in the box, show up as a team and listen carefully to what the client is telling you, take time to understand them

03.

Asking for help is a show of strength; be humble and know when to say, 'I don't understand, or I don't know'

04.

Everyone has a life outside of work, we do everything we can to support our team members wellbeing and a healthy work life balance

05.

In exchange, we expect you to give us your absolute best in delivering our company vision



**“One of the most sincere forms
of respect is actually listening to
what another has to say.”**

Bryant H. McGill

Excellence

Be the best

- 100% accountability and personal responsibility for your role – a no excuse culture
- High performance individuals and teams that attract client referrals
- Do such a great job and provide such great service, that you don't need to ask for 5-star reviews, they just happen
- Realising that things can always be improved; learning, experimenting, looking for new approaches, until we achieve what before seemed impossible





**“Be so good they
can’t ignore you.”**

Steve Martin

Go out of your way to help others



Don't hide behind rules, do everything we can to make life as easy as possible for our clients



Solve client problems with autonomy, creative thinking and humour



Understand your collective responsibility to people around you, always be prepared to do work that does not benefit yourself or your immediate team



Actively make yourself available to your teammates, remove obstacles from their workflow and share your knowledge



Everyone has a voice – speak up, provide constructive feedback to members of the team, let's get better together

“I’ve learned that people will forget what you said, people will forget what you did, but people will never forget how you made them feel.”

Maya Angelou

Assume positive intent
and good intentions.

Smile!
it's infectious!

Be a giver, not a sucker –
create positive energy in a
room, don't suck the life out of it!

**Show up
happy**

Show self awareness, understand how
your mood effects those around you.

We acknowledge that sometimes
things can be challenging, irritating
and frustrating - know who to talk to.



**“A warm smile is the universal
language of kindness.”**

William Arthur Ward



Pursue your ambition

- ✓ Setting challenging goals and objectives for the company and your own career development
- ✓ Challenging the status quo – not just accepting the way things are, finding new and better ways to work
- ✓ To try your absolute best and have no regrets when you are finished
- ✓ An always learning mentality – exams, qualifications, soft-skills

“No matter who you are, no matter what you did, no matter where you’ve come from, you can always change, become a better version of yourself.”

Madonna

Sometimes things don't quite work out as planned.

And you know what, that's ok.

We make decisions based on our core values, by hiring and promoting people who adhere to them, and letting go of people who do not.



What our team say...

Having access to Heka and knowing that First Wealth contribute to this each month makes me feel valued as an employee and as an individual. Some of the benefits I have taken advantage of through Heka so far are, cooking classes, fitness classes, massages, food subscriptions, candles, plants and more.

It's refreshing to be working for a company that is genuinely committed to looking after their staff and wellbeing.

Emma Fielding
Technical Analyst





**Results matter more than
the number of hours we work.**

**We work out loud -
we strive to constantly
give each other visibility
into the bigger picture.**

This helps us better support each other and
share a greater sense of purpose.



Diversity and Inclusion

It's important that we reflect the society that we live in. As a company, we strive to be the change we want to see in our profession.

Our goal is to create an inclusive culture spanning diversity of gender, identity, age, ethnicity, religion, nationality, colour, sexual orientation, educational background, socio-economic status, and thought.



What our team say...

First Wealth was one of the few companies in the financial planning profession who I felt comfortable applying for due to the diverse range of employees.

Since working with them I feel included, and they are actively trying to make a difference in everything they do which matters to me.

Phoebe Ellis

Client Relationship Manager



“If you become aware of any individual degrading another, then show moral courage and take a stand against it.

The standard you walk past is the standard you accept.”

William Arthur Ward



As a company we don't need to have everything figured out.

We try new things. We experiment.
We mess up. We start over.

Progress comes from the ability to take
risks and do try different things.

We treat failures as an opportunity to
learn and grow.



We build trust through radical transparency



With our clients

The advice, process, fees, what we are doing for clients and why, the language and words we use, forward planning meetings and investment proposition.



With our team

Company targets and goals, company financials, company decisions, remuneration structures, employee surveys, sharing results /action plans.

Feedback isn't just encouraged, **it's expected.**

Embrace feedback – it allows us all to get better.

Employee engagement surveys, six monthly reviews, monthly pulse surveys and anonymous feedback.

The Shadow Board allows the wider team to feedback to the leadership team on a monthly basis. Discussion and action points are made available to the wider team to aid accountability.

If someone falls short of our high expectations, you will know about it because we give and receive candid feedback constantly.

So, if you see better ways, think of new ideas, please share with the team.

Employee Benefits

Excellence

- Rock star of the month
- Team service competition (charity donation)

Ambition

- All exams paid for
- Study day per exam entered
- Professional body membership paid for
- New team member referral free

Respect

- Completely flexible working for all team members
- 8% employee pension contribution
- Private medical insurance
- 5 times death in service
- 75% income protection
- Marriage bonus
- New baby bonus
- Work from home allowance
- 2 months maternity and paternity, adoption leave

Helping others

- Free financial planning for all team members
- Mentoring from team member
- Qualified coaching for all team members

Happy people

- Up to 30 days annual holiday allowance
- Ability to purchase additional holiday allowance
- Monthly wellbeing allowance via Heka
- One month paid sabbatical every five years of service

What our team say...

As we get closer to the birth of our first child, knowing that First Wealth are incredibly supportive in offering extended paternity leave gives Jade and I real peace of mind.

This flexibility will no doubt allow me enjoy those important few weeks and provide plenty of opportunity to catch up on sleep too!

Robert Schwarz
Financial Planner





**People no longer won't work for
an organisation, they work for
a cause they care about.**

Making A Difference

NET ZERO | 2030

Committed to Net Zero by 2030



Thrive Money

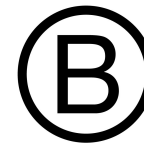


Women In Finance Charter



Chartered Financial Planning
Firm of the Year 2021/22

Certified



Corporation

Certified B Corporation

What our team say...

I wanted to work for B Corp because I am passionate about businesses working to improve the world around them and not just for profit.

Many businesses talk a good game, but at a B Corp you know you work for a business that is genuinely pushing for change and not just talking about it. I am excited to have joined the First Wealth B Corp Committee so that I can play an active role in constantly improving the positive impact First Wealth has on the world.

Peter Slot
Technical Analyst



What our team say...

Thrive Money is a fantastic initiative that aims to educate young people on the importance of saving and investing both early and in the right way!

Being involved gives me great confidence that we're doing as much as we can to put people on the right track with their finances even if they do not go on to become clients of First Wealth.

Samuel Hurst

Client Relationship Manager



Welcome aboard.

**Always be yourself, unless you
can be a pirate; then always be a pirate!**