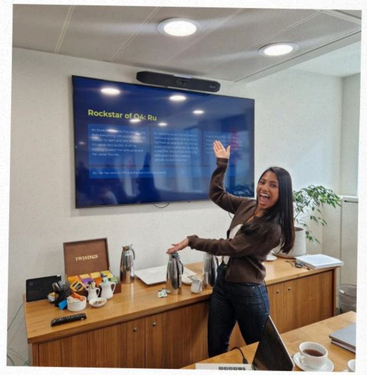
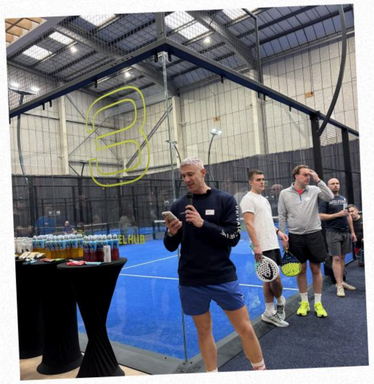
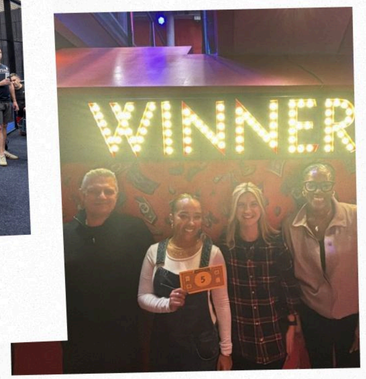














FIRST WEALTH®

2024–2025

IMPACT REPORT

OUR IMPACT AT A GLANCE 3
OUR PURPOSE 4
OUR JOURNEY SO FAR 5
B CORP SCORING BREAKDOWN 6
TEAM 7
TEAM HIGHLIGHTS 8
OUR EMPLOYEE ENGAGEMENT SURVEY 9
GOVERNANCE 10
CLIENTS 11
ENVIRONMENT 12
COMMUNITY 13
2025–2026 GOALS 14

FIRST WEALTH®

92%

Average client satisfaction score

★ Rated 5.0 on Google

28



Number of employees

£8,689.50

Donated to charitable causes

WON

Structured Product Adviser of the Year

WINNER
Investment Life & Pensions
Moneyfacts®
Awards 2025

SHORTLISTED FOR

WINNER
Investment Life & Pensions
Moneyfacts®
Awards 2025

Tax & Estate Planner of the Year

Citywealth
MAGIC CIRCLE AWARDS
2025
SHORTLISTED

Financial Planning Firm of the Year

TOP
10%

in the ARC study of 125 wealth managers

2

Your Financial Plans

100%

Flexible working

4X

Internal promotions

1X

Internship



OUR PURPOSE

At First Wealth our mission is to build a financial planning business that is both successful and joyful, one that benefits our clients our team and the wider world.

We believe money is never just about numbers. It is about choices confidence relationships and the freedom to live well. That is why we measure wealth by wellbeing not simply by financial outcomes alone.

We are driven by purpose not just profit. We respect our communities care deeply about our environmental impact embrace diversity and use our platform to create positive change within our profession and beyond it.

As a Certified B Corp we hold ourselves to higher standards of accountability and responsibility. Our commitment is to build long term value for clients and colleagues while contributing positively to society and future generations.

Our ambition is clear. To reshape how great financial advice is experienced. To be a trusted partner through life's most important moments the inspiring the uncertain the joyful and the challenging and to support people through the beautifully complex sometimes messy journey of life.

> **THIS IS HOW WE MEASURE WEALTH BY WELLBEING.**
> **THIS IS WHAT FIRST WEALTH STANDS FOR.**

OUR JOURNEY SO FAR



2008

The idea for First Wealth was formed in the aftermath of the global financial crisis, with the ambition to do financial planning differently and more responsibly.



2013–2017

During this period, the firm gained multiple industry awards and recognition, reflecting growing credibility and excellence in advice and portfolio management.



2021–2022

The business was recognised as Chartered Financial Planning Firm of the Year, marking a significant moment of industry recognition.



2024–2025

Recent achievements and award nominations, including CityWealth and MoneyFacts awards, reflect the firm's continued growth and impact.



2020

First Wealth became a Certified B Corp after an 18-month certification process, formalising its commitment to higher standards of accountability, sustainability, and social impact.

B CORP SCORING BREAKDOWN

What We've Improved

The recertification also gave us a clear picture of where we could do more, and we've taken each of those areas seriously.

Client feedback was an obvious place to start. We recognised we weren't capturing it consistently, so we've now embedded a structured feedback process into every annual review — ensuring client voices inform how we evolve.

Community engagement was another area for development. We acknowledged that our communication with external stakeholders wasn't where it should be, and we're still working on strengthening those relationships. Going forward, we're committed to deepening the impact we have on the businesses we work with, not just our immediate clients.

Environment presented our most complex challenge. Our net zero by 2030 commitment — made with the best of intentions — needed revisiting once we examined it more carefully. The core issue was the absence of a base year for emissions calculations, which is the essential starting point for any credible reduction target. To qualify as net zero, a business must reduce its carbon emissions by 90%, with the remaining 10% addressed through carbon avoidance. For a business of our size, achieving that within the original timeframe isn't feasible. Rather than retain a target we couldn't stand behind, we've now partnered with an external climate specialist to build a comprehensive carbon strategy — one grounded in genuine measurement and meaningful, achievable reduction.

Preparing for the New Standards

B Corp certification is itself evolving. The updated standards, which come into effect for our 2027 recertification, reflect the growing urgency for businesses to drive real environmental and social change. The bar is being raised across sustainability, transparency, and stakeholder engagement — and we welcome that.

At First Wealth, we see this as an opportunity, not a compliance exercise. Alongside our carbon strategy, we're strengthening our governance and accountability practices and embedding sustainability more deeply into day-to-day operations. The new standards also place greater weight on how businesses support their people, so we're continuing to invest in our team — ensuring the workplace we've built reflects our values and genuinely supports wellbeing and development.

For our clients, this means partnering with a firm that is independently verified to meet the highest standards of social and environmental performance: one that delivers excellent financial advice while contributing positively to the world around it.

OVERALL SCORE

103



11.6
Customers



20.5
Governance



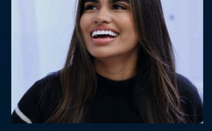
17.1
Community

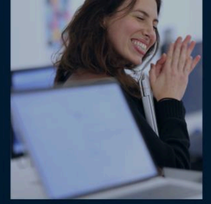


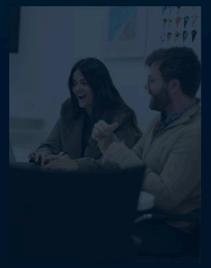
41.5
Workers

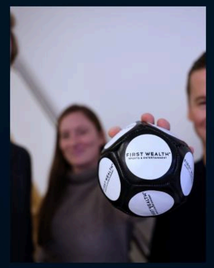


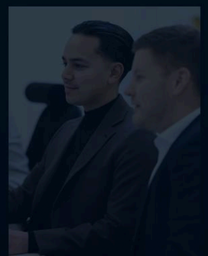
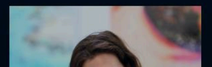
11.9
Environment

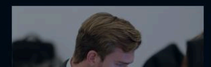
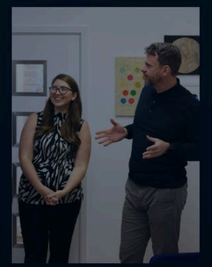






TEAM


TEAM HIGHLIGHTS

Promotions



Humaira
HEAD OF CLIENT OUTCOMES



Phoebe
SENIOR CRM



Tom
TECHNICAL ANALYST



Jess Biggs
INTERNATIONAL SPORTS AWARDS 30 UNDER 30



Seb Ridout
NEW MODEL ADVISER TOP 35 NEXT GENERATION ADVISERS 2025

Welcoming new team members



Brooke
DIGITAL MARKETING EXECUTIVE



Ru
CRM



Jess
HEAD OF GROWTH



Charlotte
HEAD OF CLIENT RELATIONSHIP MANAGEMENT



Natalie
MARKETING MANAGER



Pam
PRACTICE MANAGER



Jesse
CRM



Will
FRACTIONAL CMO



Ethan
CRM

Exam success



Matt and Kevin
BECAME CHARTERED. KEVIN HAS STARTED HIS JOURNEY TO BECOMING A FINANCIAL ADVISER

Marriage bonus



Jess Biggs, Phoebe Ellis and Natalie Weil
BENEFITTED FROM THIS

Maternity & Paternity leave



Danielle
WELCOMED A NEW BABY AND WENT THROUGH MATERNITY LEAVE



Frazer
WELCOMED A NEW BABY AND WENT THROUGH PATERNITY LEAVE

Summer internship

Sophie
JOINED AS 2025 SUMMER INTERN

100%

Renewable electricity to power our team

OUR EMPLOYEE ENGAGEMENT SURVEY

This year's employee engagement survey gave us an honest and detailed picture of life at First Wealth — what's working, what isn't, and where we need to focus. We're grateful to everyone who took the time to share their views. The findings below reflect that feedback openly, along with our commitment to act on it.

What's Working Well

Flexible working and team support stand out as clear strengths. Employees value the autonomy they have over how and where they work, and feel genuinely well-supported by their colleagues. Both of these things have a direct and positive effect on productivity and day-to-day wellbeing — and we don't take them for granted.

Growth, purpose, and talent also come through strongly. There's real optimism about the direction the company is heading, pride in the capability of the people around them, and appreciation for the values-driven initiatives that give our work meaning beyond the day-to-day. That sense of shared purpose is something we want to build on.

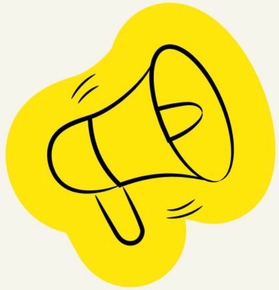
Where We Need to Do Better

Workload and resourcing is an area we know requires attention. We're aware that the pace of the business places real demands on the team, and we want to ensure people have the tools, support, and capacity to do their best work without unnecessary pressure.

Career development and communication are areas where we can be more consistent and transparent. We want every member of the team to feel clear on where they're headed and confident that we're invested in their growth — and we recognise there is more we can do here.

Bringing our values to life in a consistent, day-to-day way is something we're committed to improving. We know that recognition, fairness, and wellbeing matter deeply to our people, and we want the experience of working here to fully reflect the culture we're building together.

GOVERNANCE



Representation

First Wealth exists to make a difference — for our clients, for society, and for the world we live in. We set out to build a business that we and our clients are proud to be part of, one that does good as a matter of course rather than as an afterthought.

Living those values means genuinely listening to our people. That's why we created the Evolution Team, a group that acts as ambassadors for everyone at First Wealth, opening a direct line of communication to the board and keeping the business anchored to its ethos. The goal is simple: an environment where people feel comfortable speaking up, care about where the business is heading, and trust that their voice reaches the right people. The Evolution Team exists to carry that trust, channelling the concerns, wishes, and ideas of our team into the conversations that shape our direction.



Partnerships

Strengthening our relationships with external stakeholders is an area of focus for us. It was flagged in our previous B Corp recertification, and we've been intentional about addressing it. One of the most valuable resources available to us is the B Corp community itself, businesses that have navigated the same challenges and are willing to share what they've learned, particularly those operating in service-based industries similar to our own.

With that in mind, we're actively building a local B Corp network, bringing together businesses in our area to share ideas, hold each other to account, and collectively push for better practices. We believe that collaboration within this community is one of the most effective ways to drive meaningful progress, and we're excited about what we can achieve together.

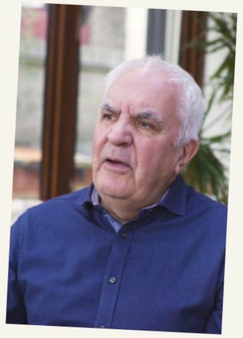


Reporting

Our commitment to transparency doesn't stop at our internal culture. We produce this impact report to share openly what we're doing, hold ourselves accountable, and contribute to a wider conversation about what responsible business looks like in practice. We hope that by being honest about both our progress and our challenges, others can learn from our journey just as we learn from theirs.

When businesses are willing to be scrutinised publicly, not just to celebrate wins, but to acknowledge where they're still growing, it creates the conditions for change that goes beyond any single organisation. That's the standard we hold ourselves to, and the kind of impact we want First Wealth to have across our industry.





I have worked with First Wealth as my financial advisers for as many years as I can remember. Always highly professional with attention to detail, providing a variety of options and choices, backed by a deep knowledge and genuine ambition in achieving my goals.

ROGER WEBB



Managing Director Anthony Villis, has brought real clarity to my investment strategy, and their evidence-based approach continues to give me confidence in their service. Thoughtful, informed, and always responsive, they have been a valued hand during a big life transition, and I couldn't recommend them more highly.

NEIL DARKES

CLIENTS

146 ★★★★★ reviews and counting

WHAT'S NEXT

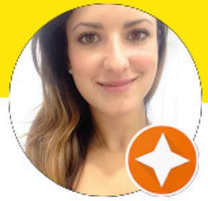
→ Continue delivering excellent service
→ Improve internal processes such as onboarding
→ Always striving to improve



★★★★★

Anthony, Fraser and the team at First Wealth have been brilliant in helping me with my financial planning post exit. They understand the DNA of entrepreneurs like me better than any wealth manager out there and I've met a lot of them! Particularly like their evidence based approach and superb level of service and support.

TERENCE O'DWYER



★★★★★

Working with the team at First Wealth has been a consistently outstanding experience, and I cannot recommend them highly enough – especially Rob and Humaira. They provided me with unmatched expertise in tax and estate planning, which was genuinely second to none. What truly set them apart, however, was the remarkable clarity and profound empathy they offered, transforming what could have been complex and emotional conversations into clear, understandable discussions. They didn't just dispense advice; they gave me a powerful sense of calm and confidence as I navigated significant decisions about my future and legacy.

GAYATRI WOOD

First Wealth have been our financial advisers for the past 8 years and provided us with a great service. Petra is always ready to help and gives us financial confidence in these uncertain times

LIZ JUDGES

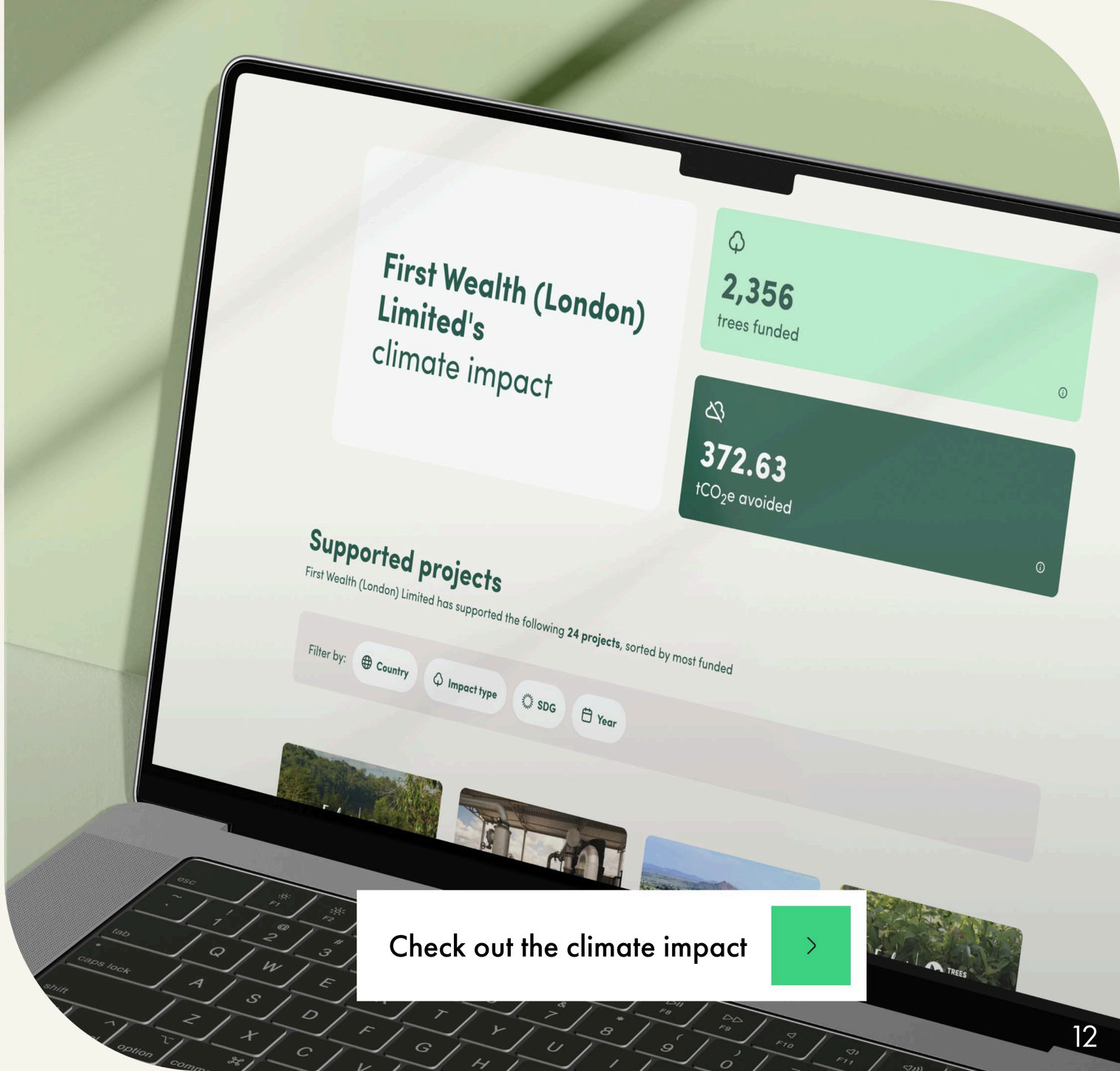


Working with First Wealth, and Petra in particular, has been a very pleasant

ENVIRONMENT

Collaboration with Ecologi

We partner with Ecologi because they're a reputable organisation that helps us measure our impact beyond just tree planting. Through our partnership, we've funded 2,356 trees and avoided 372.63t CO2e through diverse climate projects including avoiding methane emissions from landfill in Brazil and protecting the Matavén forest in eastern Colombia. These projects demonstrate our commitment to supporting verified, meaningful climate action across different ecosystems and approaches. Our journey to net zero has been a learning experience. We initially planned to achieve net zero by 2030, but as we dug deeper into the requirements, we realised this timeline wasn't realistic. To be truly net zero, we need to reduce our carbon emissions by at least 90% from a verified baseline year, and while we already operate with relatively low emissions, we didn't have the calculations from our base year to work from. Rather than rushing to claim a net zero status we couldn't substantiate, we've spent over 18 months working to find the right partner who can accurately calculate our emissions whilst also providing us with the robust data we need to make genuine, measurable progress. With the help of Climate Partner, their evidence-based approach reflects our commitment to transparency and real impact over greenwashing.



COMMUNITY

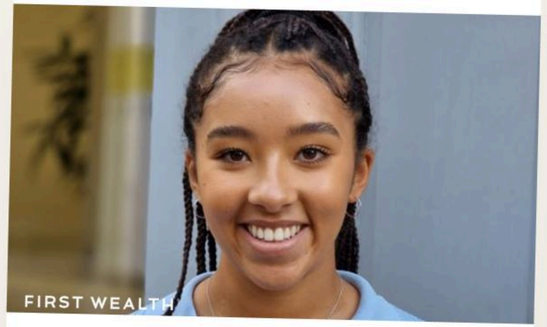


Lunch and Learns

These were introduced as a way for us to learn more about each other and about the lived experiences within the business. Sessions have included topics such as Ramadan, autism, alcoholism and others.

Thrive: driving financial inclusion

Thrive is our initiative focused on improving financial confidence and accessibility. As we move into next year, we're reigniting Thrive with greater capacity to deliver meaningful impact through education and community initiatives. As part of this, we've run the CII exam campaign to help make the industry more inclusive.



Awareness campaigns for Black History Month Pride International Women's Day

These link closely to our lunch and learns. Raising awareness of cultural moments and giving employees a voice is important to us. Campaigns have included Black History Month focused on hidden figures, Pride, an International Women's Day event and the launch of our women's network.



B Local

B Lab creates space for B Corps to connect and share ideas. We launched a Marylebone based B Local to bring together local businesses, both certified and not yet certified, to exchange ideas, share best practice, collaborate and explore how we can improve. It also helps us expand our presence beyond financial services and create impact across sectors.

WHY WE DO THESE INITIATIVES

Help the team feel seen

Attract diverse talent

Lead the way in building a better financial services industry

PARTNERING WITH CHARITIES

GLOBAL RETURNS PROJECT

grief encounter

FIRST WEALTH WOMEN'S NETWORK

2025–2026 GOALS

FIRST WEALTH®

Improve employees carbon literacy through partnership with external carbon reduction consultancy

Roll out the Future First Wealth Academy - a dedicated recruitment programme

Complete set up of the First Wealth Foundation and nominate 4 charities for donations

Complete a gender pay gap analysis

Host an insight day with professional services network to improve community impact

Re-work company policies and establish new ones, ensuring alignment with the team

Deliver projects supporting B Corp re assessment under the new structure

Develop our Measure Wealth By Wellbeing framework

Establish OKRs for the Evolution Team

Host a successful B Corp 'B Day' focused around the First Wealth values and how we live them day to day