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## BECKETTS AT A GLANCE

  
4,100+  
PRIVATE AND  
CORPORATE CLIENTS

 9.5  
OUT OF 10  
AVERAGE CLIENT  
SATISFACTION SCORE

3   
OFFICES

CHARTERED  
SINCE 2011



 £1.4bn  
FUNDS UNDER  
INFLUENCE

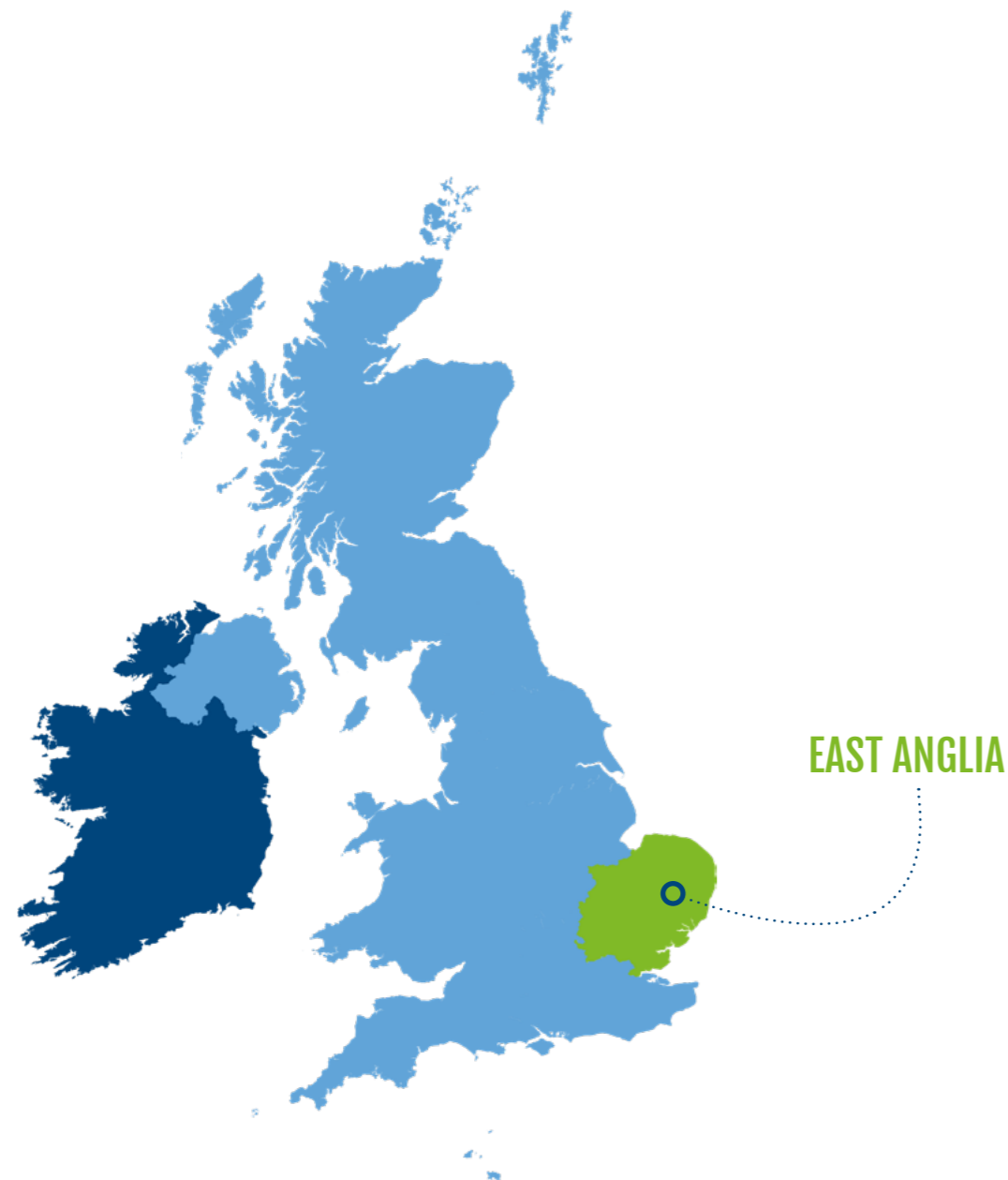
115   
STAFF

ESTABLISHED 1988  
 36 YEARS  
HELPING CLIENTS

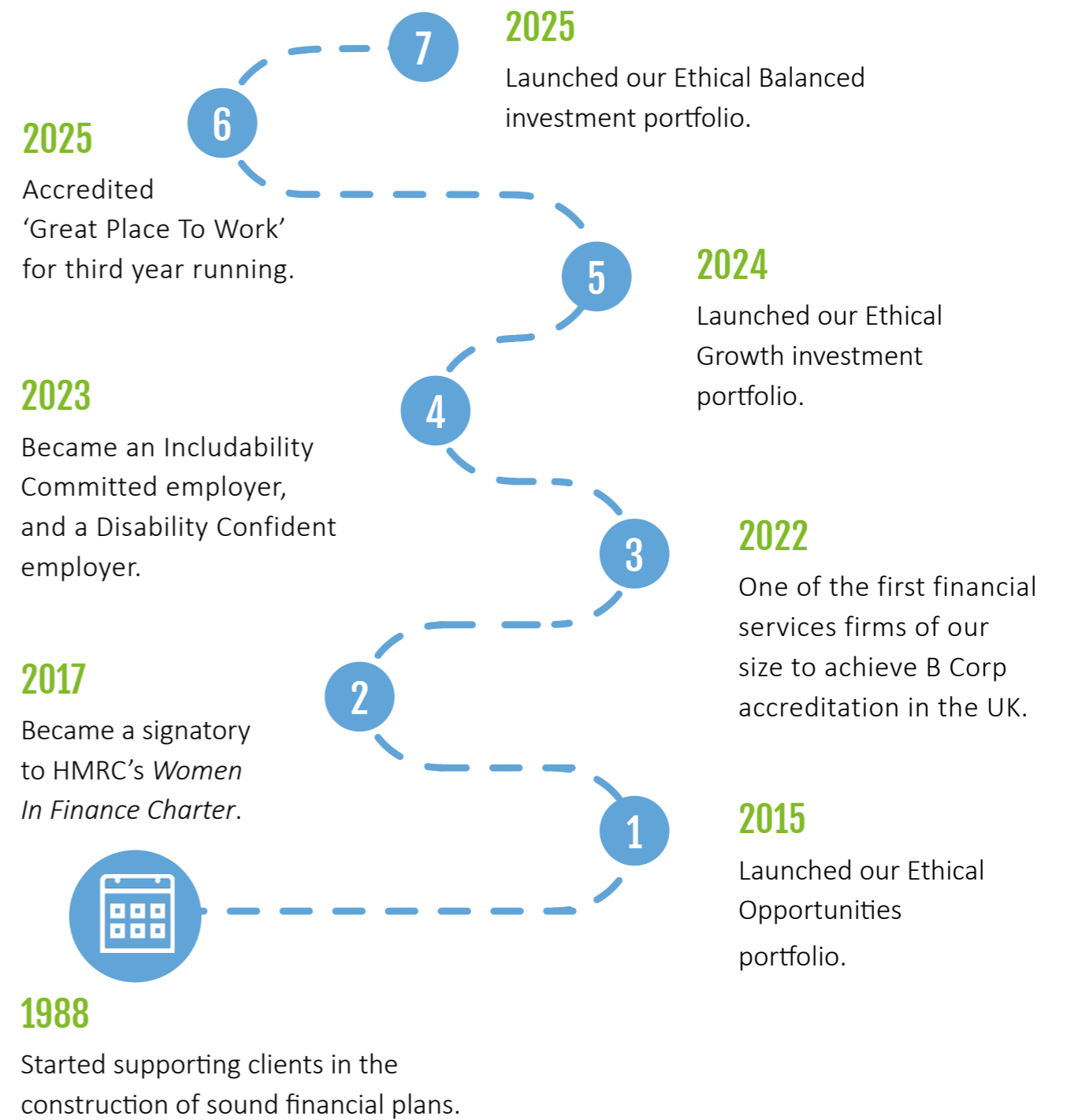
TOP 100  
 

## ABOUT US

We are one of the largest regional providers of financial advice and wealth management to individuals and corporate clients. Our offices are located across East Anglia in the UK and we currently manage assets in excess of £1.3bn.



## OUR MILESTONES



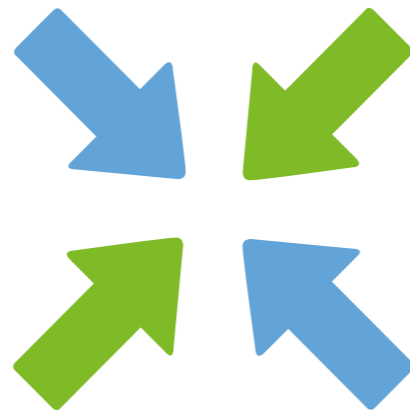
# OUR VISION

We want to be a great place to work that provides best-in-class customer service. Many organisations have Mission Statements but we prefer to articulate our journey with a cartoon. It's displayed within our offices, on our website and features in much of our material, especially recruitment.

The cartoon was created by one of our team. We also use his skills to create cartoon videos that explain financial topics in a fun and engaging way.



# OUR PURPOSE



## COMMUNITY

We are passionate about playing a valued role in the community we serve. Our responsibilities connect us to the wider society, ensuring we support and promote financial and emotional health and wellbeing.

## CONTROL

We have a responsibility to deliver trusted advice, and provide support and influence. This enables the Becketts community to make choices that lead to greater control.

## ACHIEVEMENT

We believe that fulfilment comes from achieving personal goals. It is the responsibility of the Becketts community to empower individuals to make well-informed decisions.

## SECURITY

Locally and globally, change is the only constant. Our purpose is to empower the Becketts community to think responsively and clearly.

## INTRODUCTION FROM OUR CEO



**IAN WHITE**  
**EXECUTIVE CHAIR**

**A**s a Certified B Corporation since 2022, I am delighted to present our third Impact Report, demonstrating how our commitment to balancing purpose with profit continues to drive meaningful change across our organisation and communities.

I am proud to highlight our key achievements over the past year:

### RECOGNITION AND AWARDS

- Achieved Great Place to Work® certification for the third year running, with 83% of employees stating Becketts is a great place to work – substantially higher than the 54% average for UK companies.
- Recognised as one of the UK's Top 100 Financial Firms by both FT Adviser and New Model Adviser publications.

### COMMUNITY IMPACT

- Successfully completed our 2024 fundraising target of £10,000 for Suffolk Community Foundation focused on Health and Wellbeing.
- Launched our Ethical Balanced investment portfolio, designed to deliver long-term returns while upholding environmental and social principles. This is our third ethical investment portfolio.

We are committed to continuing our journey of improvement, ensuring our business remains a force for good for our clients, colleagues, communities, and the environment.

Our certification is far from a destination – it is a continuous journey of growth, accountability, and positive impact. We look forward to building on these strong foundations as we work towards an even more sustainable and equitable future.

# B CORP SCORES

## TOTAL SCORES

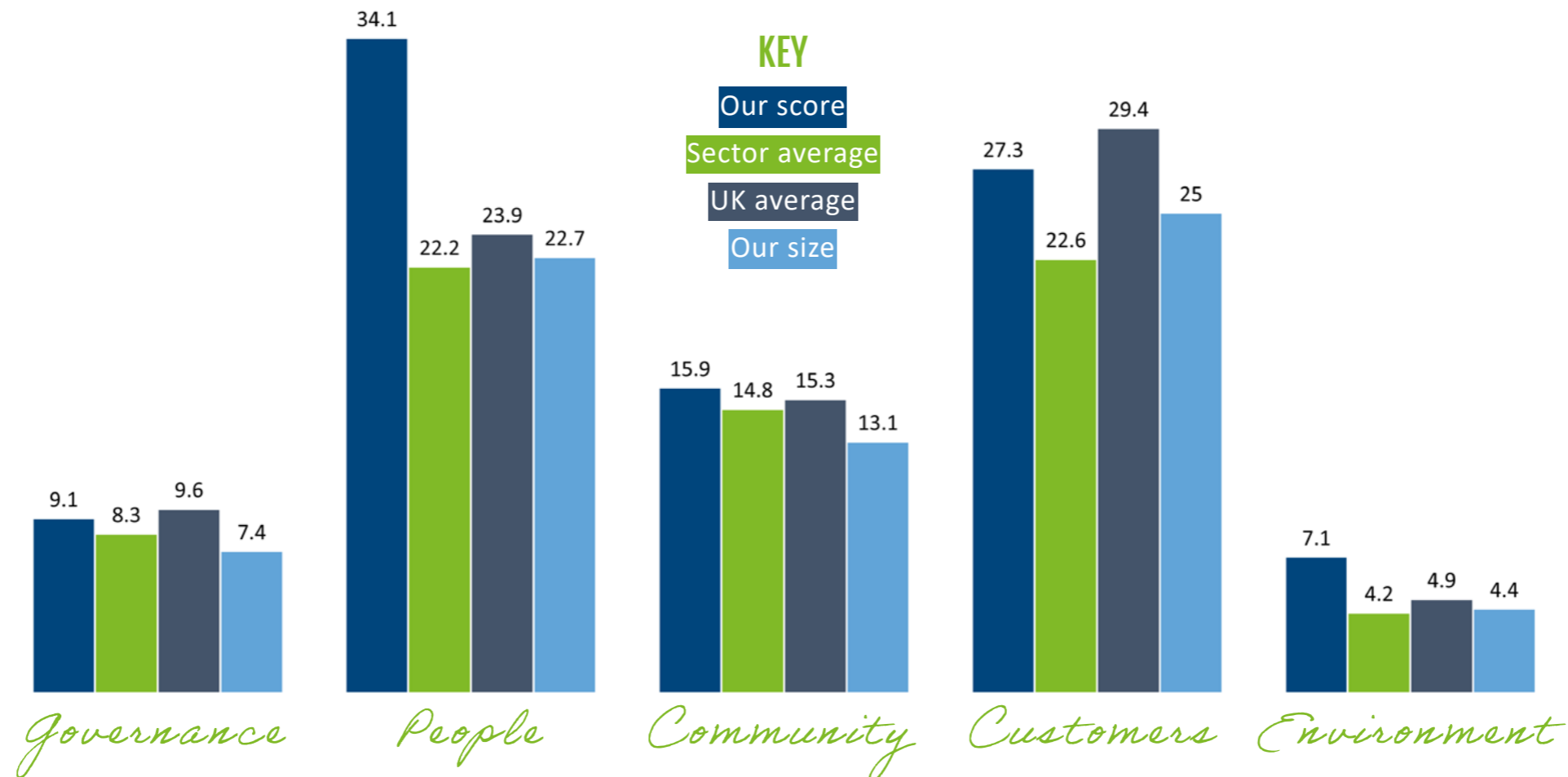
DATA CORRECT AS OF APRIL 2022

OUR SCORE	SECTOR AVG.	UK AVG.	OUR SIZE
93.8	81	82.2	77

## BENCHMARK

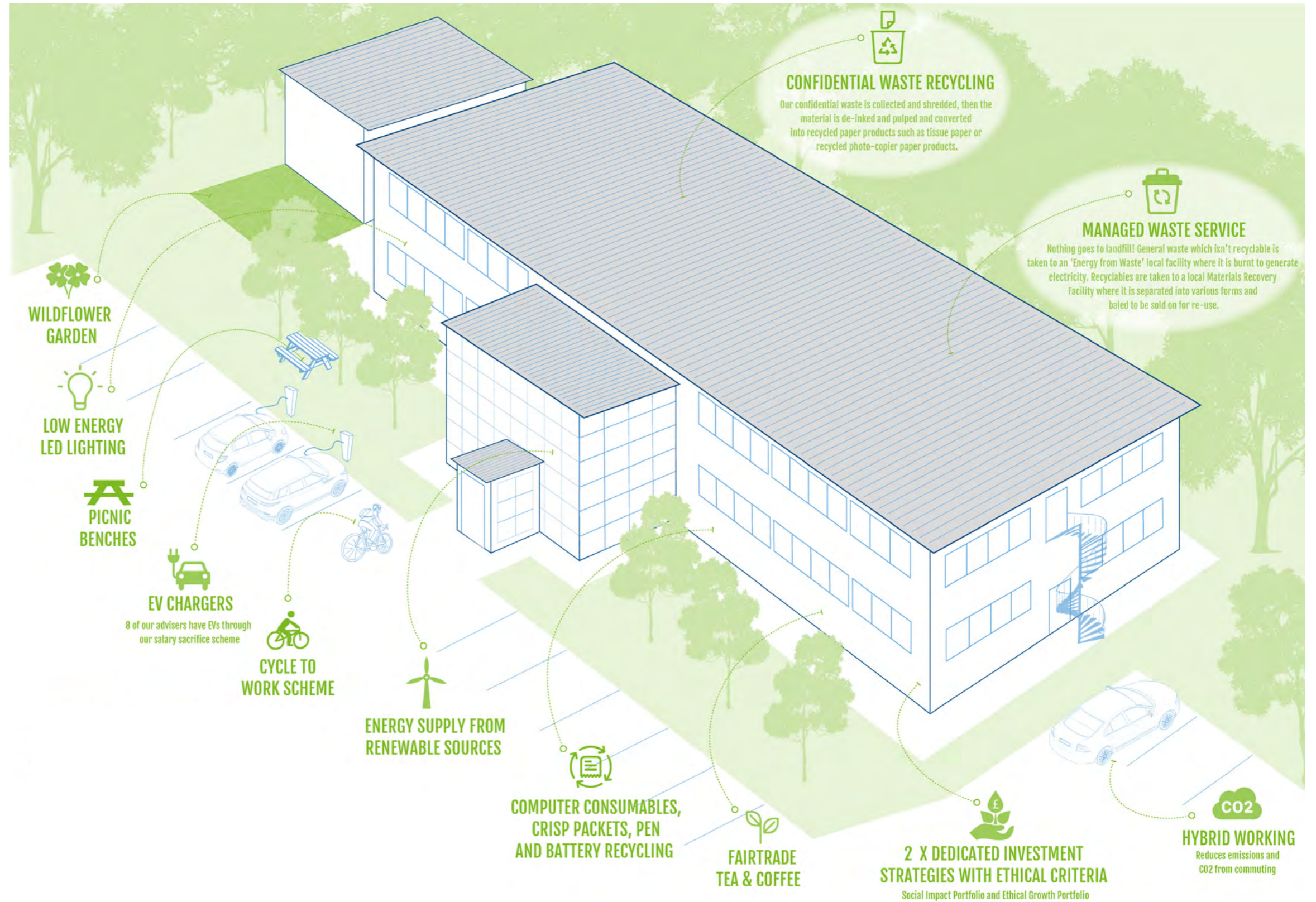
MARKET:	COMPANY SIZE	SECTOR	INDUSTRY CATEGORY	INDUSTRY
Developed - Global	50-249	Service	Financial & insurance activities	Investment advising

CURRENTLY GOING THROUGH RE-CERTIFICATION AND AIM TO BE ABOVE 100



# ENVIRONMENT

Here are all the steps we've taken at our head office in Bury St Edmunds to improve the environment and reduce our carbon footprint.



## SUFFOLK CARBON CHARTER

We achieved the Silver level of the Suffolk Carbon Charter in 2024, having had the Bronze accreditation since 2020. The award is presented to small and medium sized firms in recognition of the steps they have taken to reduce their carbon emissions and support the local environment. We are currently working towards the Gold level.



## EVENTS WE'VE ATTENDED

We are always looking at ways of promoting B Corp and other ESG topics by being involved with various groups. We were the first speaker to present at the inaugural sustainability wing of the Cambridge Network, and we have also presented to the West Suffolk Chamber Of Commerce Net Zero Group.

## BIODIVERSITY

We have also learned that there is little point in tackling the climate crisis without also addressing biodiversity and so some of our team have let their home gardens grow wild, and we have replaced some grass at our office with plants to attract pollinators.



## *What we're working on*

- The success of our electric vehicle scheme has resulted in eight of our advisers changing from fossil-fuel powered cars to EVs. We hope more of our advisers and staff will change to electric vehicles using the salary-sacrifice arrangement we have put in place.
- We are also starting to promote second-hand EVs to our staff which can also be acquired using the salary-sacrifice arrangement.
- Sadly, we are not able to install solar panels on our offices in Bury St Edmunds. The reason being that the building is owned by a SSAS pension scheme and it was the pension scheme owner who was going to buy and install the solar panels on the roof. This is prohibited by HMRC under the 'tangible movable property' rules. This is not something that the landlord is able to do and so we are considering other options.
- We want to continue to increase our involvement with local business groups and thereby champion the merits of environmental governance and B Corp certification.

# GOVERNANCE

## WOMEN IN FINANCE

We remain signatories to the [HM Treasury's Women in Finance Charter](#), which aims to improve gender balance in senior management within financial services. As of April 2025, the Women in Finance Charter has over 400 signatory firms, encompassing a diverse range of financial services organisations—from global banks and insurers to fintech startups and building societies. These firms collectively employ approximately 1.3 million people across the sector. Each signatory sets its own targets and timelines to increase female representation in leadership roles.



## Women in Finance Events

We held our third internal Women in Finance event in June of 2024 with the theme of 'resilience'. Following feedback from previous events, we had a mixed panel sharing their stories: Martin Moore, Jane Drummond, Kirsty Goodchild and Charlotte Wilson each gave a 10-minute presentation. We were also joined by one of our clients, Alison Proud, who shared her personal journey to becoming a life coach and the challenges she faced.

## International Women's Day

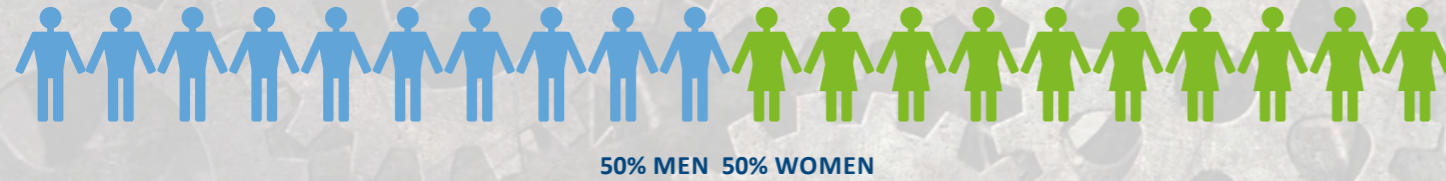
On International Women's Day, we took a moment to recognise the women at Becketts and their personal and professional achievements. From seasoned leaders to emerging talents, these women are making their mark and proving that gender is never a limitation.



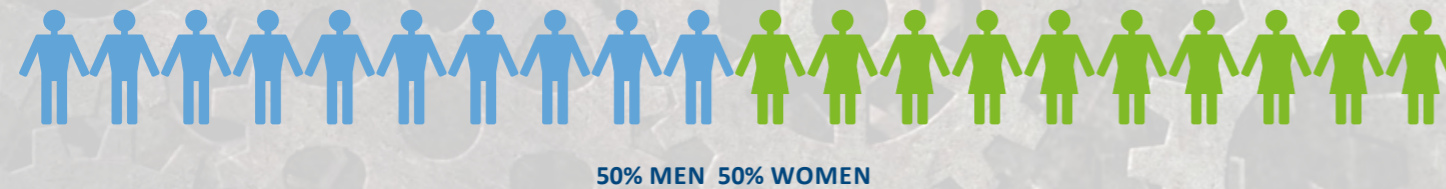
## GENDER DIVERSITY

Our firm enjoys exceptionally high levels of gender diversity across all levels and our aim is to maintain gender balance across all parts of the business.

### *All of Becketts*



### *Management Team*



We first published our gender diversity information and our parity target at the end of Q3 2017 and, since then, the split has changed as we have recruited new staff to help with our growth, and we made some changes to our structure.

As at 31/08/25, we had 50% female representation in senior management.

Gender diversity, and all diversity strands, are as important as when we first signed up to the Women In Finance Charter in 2017. We are always looking at our recruitment and training & development policies. For example, through our Beckett Academy app, personal objectives logged must link to the corporate objectives, which include our WIF parity ongoing target as part of our “leaders in ESG” objective.

## DIVERSITY AND INCLUSION INITIATIVES

Our mission is to make diversity and inclusion a priority in everything we do, and here are some of the initiatives that Becketts is undertaking to promote it in our team:

- We launched formal management training with 50% of the first cohort being female.
- We include items on diversity in our staff newsletters.
- We are capturing data at staff appraisals on staff education levels in order to show a spread of social background by position.
- We are an Includability Committed employer which means we strive to create an inclusive, sustainable and mentally healthy workplace culture.
- We have launched a sub-group for autism and other neuro-divergent conditions.

## GENDER PAY GAP

The gender pay gap is the difference between the average (mean or median) earnings of men and women across a workforce. The gender pay gap is not to be confused with equal pay, but instead looks at all roles at all levels of an organisation, rather than comparing pay received by men and women for the same role.

The financial services sector has typically shown one of the largest gender pay gaps in Britain, often attributed to a lack of women in senior jobs.

According to a recent Reuters article that collated pay gap data from 21 major financial institutions, there is a narrowing in their average mean gender pay gap of two percentage points from a year ago to 28.8%- but it still remains far higher than the mean average for all industries in Britain which was 10.7%.

We voluntarily calculate and report ours as we are not required by regulation to report due to size.

### *What is our gender pay gap?*

We last calculated our mean Gender Pay Gap data in March 2025 which was 26%; the previous calculation was done in November 2021 at 33% so we have reduced it by 7%.

### *What we're working on*

- We created a new Employee Forum to make sure all members of our team have the opportunity to influence the direction of our company.
- We have recently launch an Aspiring Advisers group which provides support and direction to the many junior members of our team who are looking to become financial advisers.
- In common with most other firms in our industry, our Gender Pay Gap needs to improve and so we need to:
  - » Make sure we are attracting more women into the world of financial services by attending careers fairs and working with local schools;
  - » Capture the broadest range of candidates for new roles;
  - » Develop focused talent programmes in our business, aiming to achieve more women in senior roles and higher earning positions.
- Target under-represented groups that are exposed as a result of our Diversity Directorate and Gender Pay Gap analysis.

# PEOPLE

## TEAM

Our people are everything. That's why we:

- Provide emotional needs training for everyone who joins us through Suffolk MIND.
- Make sure everyone knows what's happening via staff newsletters, surveys, and group briefings.
- Offer some of the best employee benefits available. OK, as a company that advises other companies on their staff benefits, we've got inside knowledge on this but let's just say that private health care, life insurance, income protection and many other benefits are all exemplary.
- Provide enhanced maternity and paternity pay.
- Let our staff share in the profits our company achieves.
- Encourage people to train and study with us to allow for internal development and progression.
- Offer a variety of clubs and social activities throughout the year that encourage cross-company involvement. We have staff committees dedicated to sports and socials.
- Provide ongoing wellness and awareness articles through an employee engagement platform.
- Enjoy exceptional levels of engagement amongst our team. We know this because we closely monitor it and act on all the feedback we receive.

## OUR VALUES

We created a set of five values to support our vision and culture.

### RESPECT

We treat each other fairly and appropriately, with kindness and respect, valuing each person's individual experience, perspectives and contribution

### COLLABORATION

We work together, cultivating an inclusive and impactful community

### PROFESSIONALISM

We aim for quality in everything we do, taking pride in our work, delivering impact through our commitment

### INTEGRITY

We act in a principled way, being honest and open, checking, challenging and changing our practises and behaviours

### INNOVATION

We become inspired by possibilities, venturing into the unknown with open minds and having the courage to embrace change



*There is a lot of available support in all places, and even if people are busy, they still make the time to help me and never make me feel unheard.*



*The supportive and collaborative environment has made it a pleasure to come to work every day.*



*I was quite taken aback by how much everyone here genuinely cares about not only the clients but also each other.*



*Everyone at Becketts have been very friendly and helpful and I could not have wished for a better team to work with.*

### BECKETT ACADEMY

Becketts has built a structured and measurable approach to developing talent through the Beckett Academy, which offers accredited courses, CPD sessions, and external training delivered by charities and professional partners (e.g. Autism Awareness, Cancer in the Workplace, Menopause Awareness, etc). Career timelines are integrated into our Academy App, linking objectives and behaviours to progression, pay, and promotions.

### STRUCTURED PROGRAMMES & RESKILLING

Our Career Progression Framework maps pathways from apprentice to director. In the last 12 months, 12 employees have been promoted, supported by six-monthly career check-ins and 100% personalised development plans.

### MENTORSHIP & CAREER OPPORTUNITIES

Our Aspiring Advisers Group has successfully developed six client-facing advisers, creating a pipeline of future financial planners and addressing industry shortages. Young apprentices also benefit: Callum, our first under-25 apprentice, joined after a Becketts adviser presented at his college. His Business Admin Level 3 apprenticeship provided early entry to the firm.

### PARTNERSHIPS

We actively partner with local colleges to provide career talks, workshops, and apprenticeship pathways, helping young people understand opportunities in financial services.

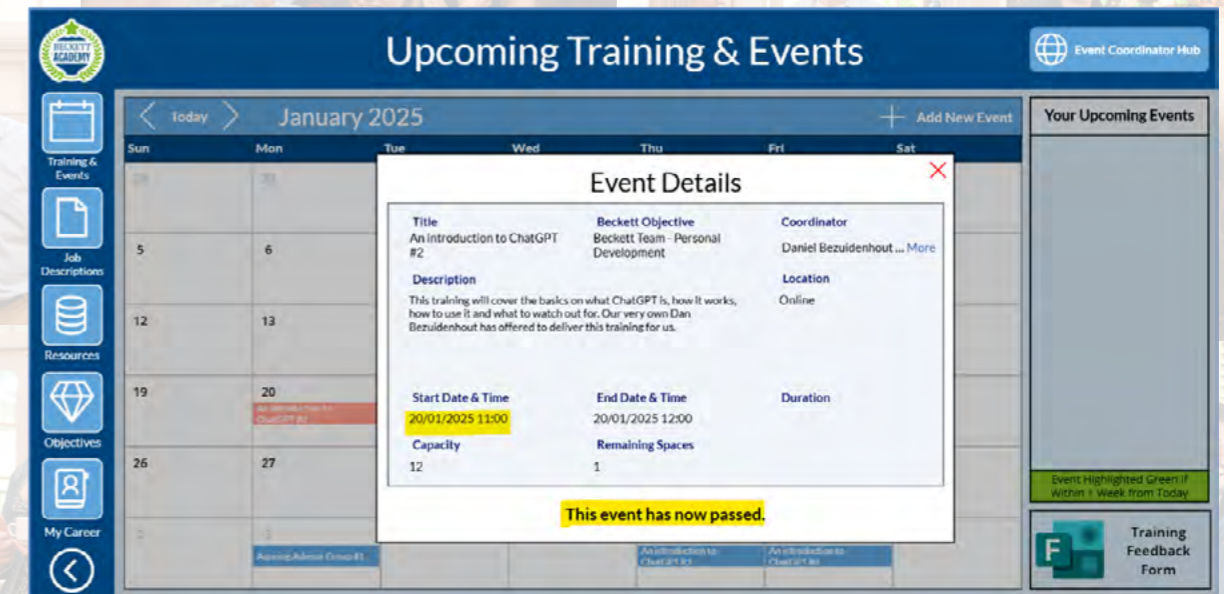
IMPACT: With 9% of our workforce under 25, and 7% staff turnover, we provide long-term career opportunities while maintaining industry-leading retention.

### CORNERSTONE EMPLOYER

Cornerstone Employers are a flagship community of more than 300 businesses across England. They work with Careers Hubs, to support world class careers education at scale in their local region.

Our Cornerstone Business showcase was launched in 2023 and members of the Beckett team have taken part in numerous Careers Fairs and mock Interviews and also offered a number of work experience placements, with one work experience person actually joining us in a full time role and another person coming back for a fortnight's project work.

We hope to influence and inspire more young people to enter our industry, and we want to help build a diverse future talent pipeline and help to fill skills gaps. We are backing social mobility locally by working with Careers Hubs to support those who face the most barriers to reach their potential when they leave education.



### *What we're working on*

- Our staff engagement levels are proven to be exceptionally high but this can easily fall as our company continues to grow. We need to closely monitor what our staff feel about Becketts.
- The participation in our Employee Forum has been strong and we need to ensure the Forum's outputs are embraced by everyone in our team.
- Our Health & Wellness policies need to be optimised to ensure our staff can benefit in the best way.

# COMMUNITY

## VOLUNTEERING

Our staff are given a fully paid 'Volunteering Day' each year and we have introduced formal volunteering policies that are designed to increase the uptake even further.

### *Volunteering with Suffolk Owl Sanctuary*

Ten of our team took part in volunteering at the Suffolk Owl Sanctuary on the 15th October 2024. We were tasked with painting a room which was going to be used for indoor flying displays so they could extend the time during the year in which they could demonstrate their birds to the public. The birds have to have suitable weather conditions in order to be flown outside, so this would give them more options.

It was really nice to be able to do some volunteering and to have a day with colleagues.

We were lucky whilst we were there to be able to attend a flying display.

Suffolk Owl Sanctuary were very grateful for all our help.



### *St Nicholas Hospice*

From one of our volunteers: "Some before and after pictures of our day gardening at St Nicholas Hospice. Hard work, but it was a lovely sunny day, and we've been told that they are delighted with our work 😊"

We tackled two 'banks', a raised bed and Matt cleared all the leaves from the grass. One of Pete's clients looks out onto where we were working, she's really chuffed with what we did and she's going to look out for the bulbs we planted.

Would definitely go back – a rewarding day."



# FUNDRAISING

In 2025, we remain passionate about supporting local charities and continue to focus our efforts on the fund we have set up at the Suffolk Community Foundation: <https://suffolkcf.enthuse.com/cf/becketts-health-and-wellbeing-fund>. In 2024, we raised £10,000 for the Fund.



You can find out more about Suffolk Community Foundation here: <https://www.suffolkcf.org.uk/>

We will continue to raise funds during 2025 and the Becketts Community & Charity Committee meet regularly to discuss ideas on how to achieve our target of £10,000.

At the end of the year, we will decide how the money will be distributed; whether it's donated to one charity within the fund or a few causes within the area.

## SECOND CHANCE STROKE GROUP

Two of our team visited the Second Chance Stroke Group—one of three local initiatives supported by Beckett's Health & Wellbeing Fund with a £2,000 donation earlier this year.

The group supports 27 stroke survivors through weekly physio, peer connection and practical help—from covering transport to offering a space to share experiences. It's run almost entirely by volunteers.

One member proudly told us she'd recently managed to peg out her washing—small moments that mean everything after a stroke.



## What we're working on

- We need to improve the take-up of volunteering across our firm and monitor it.

# CLIENTS



## PROVIDING PEACE OF MIND

Becketts has more than 4,100 private and corporate clients. We've been helping them formulate sound financial plans for their families and businesses for over 36 years and nearly all our new clients are from referrals. Our mission is to provide all our clients with peace of mind and we have lots of testimonials about how happy they are with the service they receive from Becketts (please see [our website](#)).

A recent survey carried out on our private clients revealed a satisfaction level of 9.5 out of 10.

## HELPING OUR CLIENTS AT EVERY STAGE OF THEIR LIVES

We have developed our own bespoke cash flow planning software that provides clients with an idea of how long their assets and income will last. This is useful to all types of clients ranging from those moving into their first home to those looking to start using their pension pot.

## LATER LIFE PLANNING



We have two Planners within the team who are accredited by the Society of Later Life Advisers. SOLLA was founded in 2008 as a not-for-profit organisation. SOLLA advisers are committed to raising the standards of practice for those offering advice to older people by building relationships with statutory and voluntary organisations, identifying and developing best practices and acting as a source of technical excellence for individuals, their families and other professional bodies.

Our SOLLA Planners understand the specific needs of older clients and have good interpersonal skills so that they can explain complex issues in a way that is appropriate to people in later life and their families.

## VULNERABILITY TRAINING

Here are some of the initiatives that have taken place in the past year:

- Carried out team training about why it's important to identify vulnerable clients.
- Introduced new segmentation based on client needs (eg, Complex, Moderate, Simple, with a separate category of Vulnerable) to ensure advice and service is centred around the changing needs of clients.
- Introduced a new document called 'What to do when a loved one dies' and carried out team training.
- Received Dementia Friends training for new members of the Private Client team.
- Received training about talking to clients about bereavement and the soft skills required.
- Developed a group of Vulnerability Champions (mix of Financial Planners and their support teams) to support with difficult conversations.

## *What we're working on*

- We're looking to help our clients understand more of the benefits and purpose of becoming a B Corp.
- We are developing professional connections to promote financial education and resilience especially on divorce.



## BECKETT INVESTMENT MANAGEMENT GROUP

PERSONAL FINANCIAL PLANNING, EMPLOYEE BENEFITS AND WEALTH MANAGEMENT

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