



Community Investment Standard

Doing business the right way

1. Introduction

This is the Community Investment Standard (the “Standard”) for Quilter plc. It sets out, and provides guidance upon, the Group’s approach to community investment and working with charitable organisations. Alongside other policies, this standard contributes to the system of internal control as set out within the Group Governance Manual (GGM).

Objectives and definitions

The purpose of this Standard is to set the high-level requirements to be applied across Quilter plc to ensure community investment activity is managed consistently across the businesses and complies with applicable legislation and regulation.

By ‘community investment’ we mean the donation of money, hospitality, employee time or services from Quilter plc to a charitable organisation with the sole intention of creating positive social impact, and from which Quilter plc receives no commercial benefit (including products and/or services) in return.

2. Community Investment Standard

We will:

1. ensure that The Quilter Foundation is managed effectively to ensure its long-term sustainability and compliance with applicable legislation and regulation.
2. use The Quilter Foundation as the primary vehicle for our community investment activity.
3. not make donations to political, religious or professional sporting organisations, non-charitable entities, individuals or personal Charities Aid Foundation accounts.
4. keep a record of all charitable contributions made on behalf of the company.
5. provide a matched funding scheme for colleagues who support charities via fundraising activity and Give As You Earn (GAYE). Charities must meet requirement of point 3 (above).
6. provide colleagues and Full Time Contractors (with over 6 month’s continuous service) with one day of paid leave each year to volunteer with a charity or community group during working hours.



3. Governance and oversight

The Quilter plc Board oversees responsible business conduct.

The principle Quilter Group level Forum relevant to responsible business conduct is the Responsible Business Forum. This is a management group appointed by the Quilter CEO to provide oversight and direction with respect to its approach to responsible business, including community investment.

Review

The Standard is subject to review at least annually and more frequently in the event of a significant change impacting this Standard.

As at December 2019.

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