

Small steps to help make the world a better place



Welcome to Wren Sterling

Wren Sterling is committed to supporting the planet to become more sustainable through our actions as a company, as individuals and the investment options we present to you.



When you become a client of Wren Sterling, we want you to feel confident that your financial affairs are in the hands of an expert and that you're making a positive difference to the future of our planet. There are several ways we can help you to do this:

1. Sign up to our Personal Finance Portal
2. Help decide how we put our paperless savings towards a greener planet
3. Explore our Impact Investing proposition to make sure your investments are delivering a return for the planet as well as a financial return

Our journey began a couple of years ago shortly after David Attenborough's landmark plastic documentary when we collectively realised that we could quickly and simply make small changes to positively impact the world we live in. Often it is easy to carry on doing what you've always done and leaving change to others but we wanted to ensure our organisation changed.

We immediately started work on our Impact Investing proposition and set about raising awareness among our employees about our future direction.

Our mission as a business is to help our clients navigate their financial journey, which we interpret as guiding them towards long-term financial goals, but we want to do that and sustain the future of our planet at the same time for the generations that follow us.

I hope you'll join us in this approach and I welcome any feedback you may have on how we can work together more effectively towards these goals.

A handwritten signature in black ink that reads 'Ian Halley'.

Ian Halley
CEO



1. Sign up to our Personal Finance Portal

Firstly, we want to save paper, energy and time by communicating with you via our Personal Finance Portal (PFP). You can still receive all the same documents as you would do via post but they're instant and secure via our PFP and allow us to make significant savings in paper and energy to support the environment.

For example, at the start of the Coronavirus crisis when physically seeing our clients was not possible, we saved over 90% of our typical paper usage versus a normal week of trading because we sent documentation electronically.

You can quickly sign up to the PFP by giving your email address to your adviser or by emailing pfp@wrensterling.com



2. We're donating paperless savings for a better planet

Secondly, when you commit to going paperless, we will commit the estimated savings to positive impact projects around the world and match the £20 estimated savings.

For every client who goes paperless and registers for our Personal Finance Portal, we will donate the savings we make on print and postage to causes aligned to the UN's 17 Sustainable Goals. Every quarter, our clients and our employees can vote for the sustainable project they want to support from a shortlist.

That might not sound like much on its own but £20 will plant four trees and Wren Sterling has thousands of clients as well as partners and corporate clients that we will encourage to take the same approach. A live update on the impact we're making as a company and clients combined is on our website at wrensterling.com/sustainable

Furthermore, you can help our advisers to drop their own carbon emissions by holding meetings virtually or over the phone and returning documents via the PFP. We know the value of face to face meetings and we will always be available that way for the important conversations, this is more for the check-in chats that we know our clients value along the way.

Our contribution will be made at the end of the quarter when you sign up to the PFP.



3. Explore our Impact Investing proposition

Thirdly, you can make sure your investments are creating positive change by choosing our Impact Investing route. There's more information in our Impact Investing brochure but we've developed a panel of investment options for our clients that meet ethical, sustainable and governance criteria. It's possible for you to know the percentage of your investments that are furthering causes such as innovation in healthcare, improving the efficiency of energy use and a host of other causes to suit your individual goals.

We find many of our clients consult their children and grandchildren at this stage to make sure their investments align to their beliefs as often these investments are made with the next generation in mind.

For more information, please speak to your adviser about our impact investing options.