

F  X & H A R E

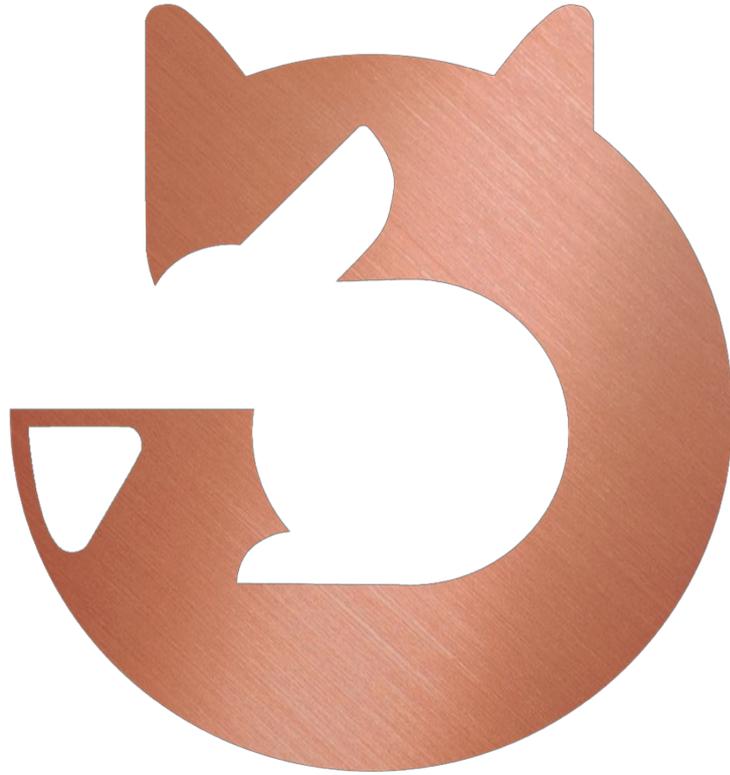
FINANCIAL ADVICE

IMPACT  
REPORT  
2020-2021

# TABLE OF CONTENTS

- 1 INTRODUCTION
- 2 MISSION & VALUES
- 3 OUR ACHIEVEMENTS SO FAR...
- 4 OUR IMPACT
- 5 COMMUNITY
- 6 MEMBERS
- 7 TEAM
- 8 ENVIRONMENT
- 9 GOVERNANCE
- 10 COMMITMENTS 2021-2022

# INTRODUCTION



Fox & Hare was born from a lack of diversity and representation in the financial services industry. Our members are the next generation of professionals, women, and same sex couples.

We help turn their aspirations into reality.

# Mission Statement & Values

We empower and educate Australians previously left behind by our nation's financial system. Through the provision of a safe, inclusive and accepting environment, we're opening the door for Australians of every gender, background and ability to start the journey toward financial freedom.



**OUR KEY VALUES:**

FRESH

FOCUSED

FRICTIONLESS

# OUR ACHIEVEMENTS DURING 2020/2021 FINANCIAL YEAR

**99**

NEW MEMBERS  
JOINED FOX & HARE  
AND WERE  
**POSITIVELY**  
IMPACTED

**16%**

OF OUR  
MEMBERS  
AT FOX & HARE  
IDENTIFY AS  
**LGBTQIA+**

**\$5,200**

DONATED TO  
OUR CHARITY  
PARTNERS

**50%**

OF THE TEAM  
AT FOX & HARE  
IDENTIFY AS  
**FEMALE**

# OUR IMPACT

Fox & Hare have an unwavering commitment to diversity, inclusion and a push to take advice to an audience outside of the traditional demographics that have come to dominate our industry.

This departure from the traditional has allowed us to realise our goals of re-engineering the advice process, by introducing a long term, goals based and values aligned focus to the financial advice we provide. We're completely focused on helping our members understand the relationship between their goals, values and their financial world.

We have always intended to have the highest ethical standards which is why we have never received referral fees and charge a flat fee only for strategic advice.

Through innovation we have added value to our members through uncommon opportunities:

- "Quarterly Economic Update" co-hosted with a highly regarded professional to provide insight on the economy
- "Ask the Experts" sessions which introduce our community to experts in the fields that matter most to them
- "Next Gen Money Workshops" which empowers businesses to help employees make smarter financial decisions
- "Wine and Wisdom" initiative hosted by Wyno, Surry Hills

We are incredibly proud of the pro-active advice model at Fox & Hare and believe that the departure from a "re-active" style of advice is key to our success.

# COMMUNITY

## OUR THREE CHARITY PARTNERS

### WEAR IT PURPLE

Wear It Purple strives to foster supportive, safe, empowering and inclusive environments for rainbow young people.

### SCHOOL FOR LIFE

School for life foundation is a not-for-profit organisation working in rural Uganda. They empower communities to help themselves and create their own opportunities.

### YWCA

YWCA Australia is an evolving intersectional feminist organisation focused on working towards a future where gender equality is a reality for young women, women and people of marginalised genders.

- The Fox & Hare Team volunteered a total of 80 hours to the community.
- Jessica Brady launched Superannuation education with Ladies Talk Money to bring awareness to the inequities experienced by women.
- Glen Hare joined the board of Wear It Purple as Board Director & Treasurer, to give back to the LGBTQIA+ community.



Thank you

# MEMBERS

**POSITIVELY IMPACTED  
99 NEW MEMBERS**

**SUCCESSFULLY HELD  
FINANCIAL WORKSHOPS  
FOR 4 COMPANIES**



**49% OF OUR MEMBERS  
IDENTIFY AS FEMALE**

**16% OF OUR MEMBERS ARE  
PART OF THE LGBTQIA+  
COMMUNITY**

**"I have had a fantastic experience with Glen, Jessica and the Fox and Hare team...I couldn't recommend them more. It is the small detail of how they operate which really feels like they go above and beyond and they have nailed the demographic that they target, making everything so relatable and easy! Would recommend them to everyone!" - Sinead**

# TESTIMONIALS

"My proudest financial achievement for 2020 would have to be paying off the remainder on my car loan and becoming completely debt free. It is exciting knowing that every dollar I earn now can go straight to achieving my goals, particularly around generating passive income. All while this happened, I even managed to pay for a holiday at the start of the year (without the use of credit card debt) ...which like many, I have a travel voucher to show for it now.

Without being greedy, it would be worth mentioning a second proud financial moment this year. I was able to start a new role with a significant pay increase from my previous role (which was very fortunate given the circumstances, especially that I am based in Melbourne). This has allowed Jess and I to work on a strategy to accelerate my targets and ambitions, which I'm motivated to see play out into the future." 🙌



"My proudest financial moment of 2020 was cracking a major milestone in my personal worth. I was lucky I was kept at 80% pay during the pandemic for only a few months, and the resulting recovery has enabled me to spend much less than planned, mostly on lifestyle costs.

Reducing my expenses right down, living a simple life, and that helped me achieve that major milestone. It will also enable me to achieve my other financial goals faster, because my additional savings and investments will propel me ahead of my plan."



"COVID has had a huge impact on the financial lives of many but I am proud to say that I was able to use it to my advantage. I know I am privileged to be able to say so but I was able to pay off my credit card debt during the period and have been able to keep it off. I always believed that credit card debt was just a fact of adult life, but I've learnt it doesn't have to be this way. Paying it off has meant that I start saving for the things I really want in my life and that freedom is priceless."

<https://lnkd.in/exVB-D8>



"I've been fortunate to receive a considerable number of company shares. Glen worked with us to build a strategy to utilise these shares to work towards our goal of purchasing a property together. We've also created a greater structure around how we manage our cash flow to ensure we're enjoying today but also planning for tomorrow." 🙏



# TEAM

We are committed to maintaining a high level of employee engagement and acting on any opportunities to support our team.

We empower our team to continually develop, learn and grow so they are ready to leverage career opportunities.

We have created a welcoming and inclusive environment that promotes diversity and inclusivity.



JOB SATISFACTION IS ABOVE 90%

50% OF THE TEAM IDENTIFY AS FEMALE

100% OF THE TEAM HAVE RECEIVED  
CROSS-JOB TRAINING



The mental and physical health of our team is important to us which is why we have implemented Annual Wellness Days.

We are advocates for gender equality and diversity, and promote this with our hiring process.

We have created a safe, supported and welcoming environment for our LGBTQIA+ team members.

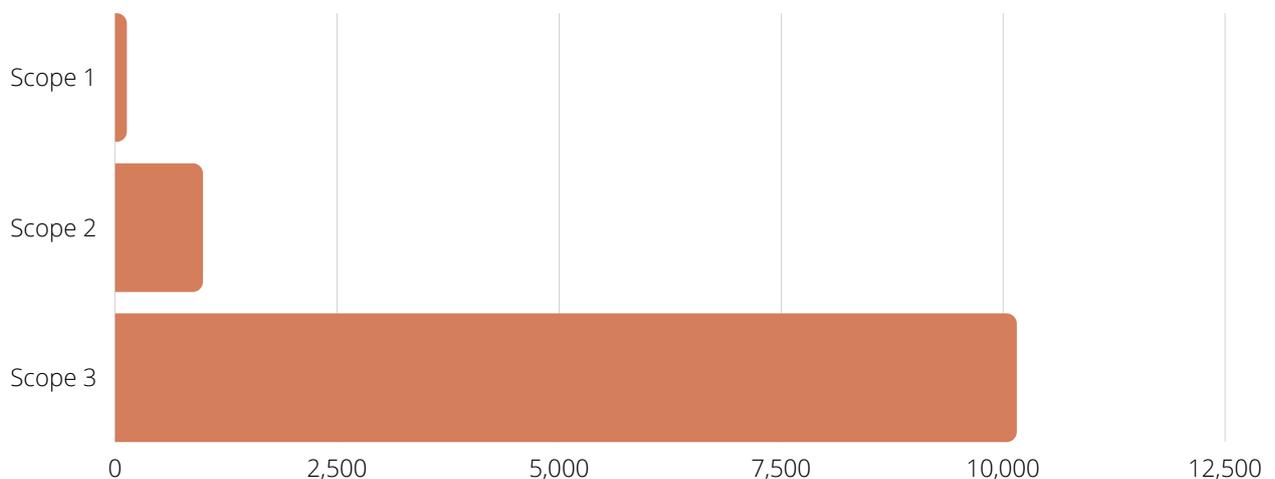
# ENVIRONMENT

Investing not only has a financial impact, but also an environmental impact which is why we intend to offer all members to consider ethical investing.

We have implemented a Virtual Office Stewardship Policy to encourage the team to choose sustainable and environmental work practices.



## 100% of Greenhouse Gas Emissions were offset



Greenhouse gas emissions are categorised into three scopes. Scope 1 covers direct emissions from owned or controlled sources. Scope 2 covers indirect emissions from purchased electricity, heating and cooling. Scope 3 includes all other indirect emissions.



Fox & Hare recognises the impact human activity has on the environment, and is committed to reducing any negative impact.

# GOVERNANCE

All Fox & Hare Financial Advisers have been FASEA certified since 2019. Which ensures we uphold a high standard in the Financial Industry.

Underpinning governance are our ethics and values, which are the principles and standards that guide our behaviour as employees and individuals.



We are continually striving to improve, and are building an incredible culture that enables our team to feel welcomed and supported, so they can provide the best support to our members.

We are committed to training the team on important social and environmental issues, so that we can improve the impact we have individually and as a collective.

# Commitments for 2021-2022

**\$5,000 donation to  
School for Life**

**Team  
satisfaction  
above 80%**

**Customer  
satisfaction above  
80%**

**\$5,000 donation to  
YWCA**

**Team to volunteer  
100 hours**

**Aim to have 50% of  
our members  
ethically invested by  
2023**

**Volunteer 60 hours  
to Where It Purple**

**Continue to create  
a diverse team with  
50% Women and  
20% LGBTQIA+**

**Launch the gender pay  
gap information with  
Ladies Talk Money**

