

Having started to become interested in Social Impact Investing over recent months, I found the SIA to be extremely interesting; insightful; and I left feeling excited for what the future holds!

STEVEN WILLIAMS / PARADIGM NORTON
FINANCIAL PLANNING

It was an extremely useful day, a chance to hear diverse views from regulators, thought leaders and social investment providers and projects, and to make contacts and swap best practice with other professionals with an interest in this area. The content was all valuable and I came away feeling far more confident in my ability to articulate and advise on social investment in the future.

GREG MOSS / BOND DICKINSON WEALTH

Outcomes

Out of 85² attendees, 64 (75%) responded to a post-event survey. 67% of these identified themselves as financial planners / wealth advisers or wealth managers, we refer to them collectively as 'financial advisers' in the survey responses shown below:

- **A net promoter score of 36% was achieved**, which remains unchanged from the last SIA
- financial advisers **travelled a distance of 2 points on a scale of 0-10** when rating how **informed** they felt they were **in the area of social impact investing** before and after the academy
- financial advisers **travelled a distance of 2.3 points on a scale of 0-10** when rating how **informed** they felt they were **about regulation** when it comes to social impact investing before and after the academy
- **86% of financial advisers** said they would be interested in finding out more about the Adviser Competency Training (ACT) for Social Investment manual
- We look to **include social enterprises throughout our supply chain** and promote their involvement with profile in the SIA brochure and showcasing their products e.g. Harry Specters chocolates as a token gift for delegates and Graphic Design & Print CIC printing the SIA brochure.



2. 4 removed due to ineligibility

Impact

- PI underwriter Liberty have agreed to consider an exclusive deal to cover firms whose Advisers study the ACT for Social Investment manual and subscribe as a "Worthstone Partner" firm
- Video content from the event will be submitted to the Law Commission in response to their call for evidence on pension funds making social investments.

Next steps

- To increase delegate attendance on the day to 150 (including 100 financial advisers / wealth managers)
- Progressing the Adviser Competency Training for Social Investment to launch by the end of Q1 2017



ACT

Thank you to the Worthstone team for organising another great Social Investment Academy. I would not have the knowledge or confidence to arrange an investment in this area if it wasn't for these events.

PAUL DAWSON / HELM GODFREY