

## CORPORATE GIVING PLAN

**This plan covers:** Fiscal years 2022/23, 2023/24 and 2024/25

**Date First Completed:** 01/10/2022

**Date of this Review:** 01/04/2023

**Next Review Due:** 01/04/2024

**Involved in philanthropy planning:** RW / CB

**Decision-makers:** CB

### 1. The core values that shape our giving plan:

1. **Humanity:** We're financial experts, and meticulous ones at that, however our real passion lies in the *human nature* side of our work, with your return-on-life, and not just portfolio balances, being the measure of our success.
2. **Authenticity:** We pride ourselves on always acting with transparency and integrity. We create space for honest discussions that put authenticity and honesty at the heart of each and every conversation.
3. **Empathy:** We take time to listen and understand how you are feeling. To see the world through your eyes. No judgement and certainly no opinion. Just a simple focus on helping you to live life on your terms.

### 2. Our Charitable Giving Statement:

At Longhurst Limited, giving means more than writing a cheque. It means giving time, expertise, in-kind benefits and, on occasion, financial support to deliver measurable results to cause areas and qualified beneficiaries and projects important to our business and employees.

At present, we have operated a reactionary approach to our giving programme, supporting the financial fund-raising efforts of our business community, environmental, and notable national and international disaster reliefs (such as NHS/Covid and Ukraine).

Our intention is to be *more* intentional with our giving, ensuring we direct our financial and non-monetary contributions to organisations involved in humanitarian, animal welfare, environmental and financial education causes. We will also still operate a reactionary fund.

We will differentiate between corporate sponsorship and charitable giving. Corporate sponsorship is discussed separately and will be recorded on the corporate sponsorship document.

### **3. Corporate Giving Priorities:**

1. Supporting the forgotten people of Europe, Africa and Asia: the oppressed and the persecuted, and those who are neglected by other organisations, those largely out of sights of the world's media.
2. Supporting those who promote animal protection, including British wildlife, animals used in scientific research and product testing, the sale of fur, and the number of animals suffering on farms.
3. Supporting those who support our planet, through the planting of trees and over environmental activities.
4. Proactively provide education, information, advice and guidance to people of all ages and at all stages of life, to help them get to grips with their money and increase their Financial Wellbeing.
5. Supporting our regional business and financial planning peer communities with their charitable fund-raising activities.

### **4. Our Aims in Charitable Giving:**

1. To make a difference.
2. To do good.
3. To shine a light.
4. To celebrate the positive wins.
5. Inspiring our clients and professional connections to follow our lead.

### **5. We support not-for-profit organisations and not individuals\*. Recipient not-for-profit organisations must:**

1. Fit within our corporate giving priorities.
2. Where relevant, be registered with the Charity Commission, with all filings up-to-date, and be governed by a board of trustees.
3. Demonstrate fiscal stability, good governance and the intention of a medium-to-long term future.

(\*) Except in the case of academic scholarships where individuals may be recipients.

### **6. Application Procedures**

There will be no active solicitation of applications. Longhurst Limited intends to be proactive in identifying qualified beneficiaries and philanthropy partners.

### **7. How We Handle Unsolicited Approaches:**

During the calendar year 2022/23, our stated aim is to focus on our work with our three identified charities. This will be reviewed again in 2025. During this time, we will retain the information of any unsolicited approaches, however we will not actively engage in conversations unless we decide to progress discussions.

## **8. In-Kind Donations**

In-kind donations of equipment, facilities, professional services, technical resources and volunteers are made when possible, following a discussion with organisations in need.

## **9. Our View about Recognition is:**

We do what we do because these charities support communities or areas of giving that have personal connection to our business. That said, where there is “a story” which reinforces our stated core values, we will create or enable publicity about our charitable giving for brand enhancement.

We recognise that publicity will benefit the charity/foundation involved by raising awareness of the cause and moreover, may challenge and/or inspire others.

All publicity is to be co-ordinated by Chris Broome.

## **10. Our Reporting Preferences/Requirements:**

As our stated aim is measurable results, we will discuss communications and status reports with project sponsors. We will agree a communications plan with an appropriate level of detail when cash in excess of £2,500 is donated.

## **11. Documentation of Corporate Giving**

Longhurst Limited is both a regulated entity with a commitment to avoid conflicts of interest, and a private limited company owned by shareholders. It is important that all charitable giving, financial and non-monetary, is documented.

As part of the decision-making process, it is important to consider and quantify the non-tangible benefits which may come from making a pledge or donation, specifically in the areas of employee relations and brand enhancement. It is recognised that there are occasions where the benefit received far outweighs the initial “cost”.

Documentation of Longhurst Limited’s Corporate Giving will begin with the completion of an annual Corporate Giving Record which appears as part of this document. This information (or parts of it) may, in future, with Board approval appear in some form as part of the annual accounts of the company and/or be included on the firm’s website.

Completing the tables that follow will provide an historic record of charitable giving. This is useful as a point of reference in press releases and in other corporate communications, internally and externally.

Chris Broome is tasked with keeping the Corporate Giving Record up to date on an ongoing basis.

## 12. CORPORATE GIVING RECORD

Responsibility for completion and on-going updating: Chris Broome

Summary of Targeted Giving for Calendar Year 2023/24	
Financial Gifts Totaling	£15,738.50
Estimated value of gifts in kind	NA
Time Totaling	NA

### DISTRIBUTION OF PLANNED GIVING FOR 2023/24

#### Core Giving Recipients:

Name	Days	£	Benefit in Kind	Date	Method of Giving
HART UK	0	£2,500	Doubled by donors to £5,000	Dec 2023	Direct
Humane Society International	0	£2,500	Doubled by donors to £5,000	Dec 2023	Direct
The Money Charity	0	£2,500	NA	Dec 2023	Direct

#### Reactionary Giving Recipients during 2023/24 (to date)

Date	Name	Days	£	Who Asked for Gift	Method of Giving	Consider Giving Again Y/N
April 23	Dementia UK	-	£50	Direct	Direct	Y
May 23	Walk the Walk	-	£37.50	Direct	Direct	Y
June 23	AnimalsAsia	-	£250	Direct	Direct	Y
June 23	Beretta Hawkins	-	£115	Direct	Direct	Y
Aug 23	GiveaLittle	-	£250	Direct	Direct	Y
Sept 23	HiS help information support	-	£100	Direct	Direct	Y
Sept 23	Niall Harbison Dogs	-	£250	Direct	Direct	Y
Oct 23	Cynthia Spencer	-	£236	Direct	Direct	Y
Dec 23	Smile Train	-	£250	Direct	Direct	Y
Dec 23	Friends of Syresham School	-	£500	Direct	Direct	Y
Dec 23	Animals Asia	-	£250	Direct	Direct	Y
Dec 23	RSPCA	-	£250	Direct	Direct	Y
Dec 23	CALM	-	£500	Direct	Direct	Y
Jan 24	Cancer Research	-	£200	Direct	Direct	Y

### Summary of Targeted Giving for Calendar Year 2024/25

Financial Gifts Target	£10,000 to £20,000
Estimated value of gifts in kind	TBC
Time Totaling	5 days (working week)

### DISTRIBUTION OF PLANNED GIVING FOR 2023/24

#### Core Giving Recipients:

Name	Days	£	Benefit in Kind	Latest Date	Method of Giving
HART UK	TBC	£2,500+	TBC	March 2024	Direct
Humane Society International	TBC	£2,500+	TBC	March 2024	Direct
The Money Charity	TBC	£2,500+	TBC	March 2024	Direct
Reactionary	TBC	£2,500+	TBC	March 2024	Direct

#### Participation in Fundraising Events not captured elsewhere 2023/24

Name	Event/Charity	Date	Value/Other Info
TBC			

### 13. Action Plan

Stage	Activity	Longhurst Team Member	Targeted timeframe to complete
Pre-launch	Educate and Planning	RW / CB	Complete
Pre-launch	Due diligence and risk assessment	RW / CB	Complete
Pre-launch	Select charitable causes	CB	Complete
Pre-launch	Contact charities	CB	Oct 2022
Pre-launch	Agree and implement communications strategy	RW / CB	Jan 2023
Launch	Website / Social / Media / Newsletter	CB	Jan 2023
Pre-launch	Arrange site visits where possible	CB	Q1 2023
Ongoing	Content marketing / magazine	CB	Q2 2023
Ongoing	Monitor charities	RW / CB	Monthly
Ongoing	Network / Commit time to charities	CB	Quarterly
Ongoing	Conduct Impact Assessment – measurables / PR	CB	March 2024
Ongoing	Formal relationship review – continue or exit	RW / CB	March 2025