

Press Release 16/01/2023

Bespoke Becomes BCorp

Bespoke - Advice Ltd., the Worcester based independent financial planning firm, today announces its certification as a B Corporation (or B Corp) affirming and cementing its commitment to delivering positive outcomes for all stakeholders: clients, employees, suppliers, its community and the planet and to greater accountability and transparency.

It immediately becomes part of a dynamic and growing global network of 6279 companies reinventing business as a “force for good”, pursuing purpose as well as profit, collectively seeking to transform the existing economic system to the benefit of all.

All businesses wishing to join this movement must undergo a rigorous assessment process and must meet the highest standards of social and environmental performance, transparency and governance. Certification addresses the entirety of a business’ operations and covers five key impact areas: Governance, Workers, Community, Environment and Customers. Successful applicants must provide sufficient evidence of socially and environmentally responsible practices relating to energy supplies, waste and water use, worker compensation, diversity and corporate transparency. To complete the certification, the company will legally embed its commitment to purpose beyond profit in its company articles.

There are currently just over 1100 B Corp businesses in the UK, across 58 industries. and the community includes such household names as The Guardian, Innocent, Patagonia, The Body Shop and organic food pioneers Abel & Cole. Bespoke - Advice, with its offices on The Tything, becomes the 5th Worcestershire business to achieve B Corp certification and is the first financial advice business in the county to realise this position.

Suzi Lane (Founder & Director at Bespoke Advice Ltd.) said: “When we founded Bespoke I wanted to ensure that decency was embedded at its core. I wanted us to be profitable and successful but not at the expense of others. I wanted our clients to know that their interests were our interests and for our people to feel that their development and wellbeing was essential to our success. I wanted our partners, suppliers and associates to feel confident in their dealings with us and for responsibility and sustainability to form part of our every day.”

Bespoke-Advice Limited

Authorised and regulated by the Financial Conduct Authority — Registration Number 616019

Registered in England and Wales as a Limited Company — Registration Number 08754524

Address: English Mutual House, 22 The Tything, Worcester, WR1 1HD

Registered

BespokeAdvice

Independent, Honest, Trustworthy

“Our B Corp certification not only demonstrates our commitment to these values and principles, it legally enshrines them in our business. It’s something for us to be proud of and something that can give confidence to those wishing to join or work with us.”

All certified B Corporations are required to consider the impact of their decisions on all stakeholders and are legally accountable to them.

Suzi Lane said: It’s easy to pay lip service to being a “good business” and to talk a good game. Becoming a B Corp not only makes us accountable for our actions, it compels us to become better; to learn and to continue learning, It enables us to measure our progress and allows others to easily see who and what we are. It firmly positions us at the epicentre of positive change and I urge all business, whether in the financial services sector or not, to find out more and get involved for the good of us all”.

Chris Turner (Executive Director of B Lab UK) says: “We’re delighted to welcome Bespoke - Advice to the B Corp community and know that they’re are going to be a fantastic addition to the community and will continue driving the conversation forward”.

“We’re pleased to have B Corps of all shapes and sizes as part of our community – from startups to multinationals and across many different industries. Business is a powerful force and B Corps demonstrate that you can do good in any sector. Welcoming Bespoke - Advice is an exciting moment because they have an opportunity to lead the way within the UK financial services industry helping formulate a new way of doing things”.

Ends

Editors Notes

- Bespoke - Advice Ltd. (BAL) was founded and authorised in July 2014 and achieved Chartered firm status shortly after.
- BAL, a registered BCorp, is privately owned and firmly committed in its delivery of high quality independent financial and mortgage advice.
- Managing Director/Founder: Suzi Lane.
- With head offices in Worcester, Worcestershire and additional premises in The City of London, BAL is a business with a growing national presence with AUM of circa £500m.
- BAL currently has 16 financial advisers with all encouraged and supported to achieve chartered status through a structured programme.

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- Working with Skills Edge Training, BAL is committed to bringing new entrants into the retail advice sector through its apprenticeship programme. The company currently has 3 active apprentices, one of whom is Level 4 qualified. They aim to on-board a new adviser apprentice every 12 months.
- Growth has been achieved organically, through acquisition of retiring adviser business and through its apprenticeship programme.
- BAL seeks to offer clear, transparent and progressive retirement solutions for advisers wishing to exit the industry whilst delivering outstanding service to acquired clients.
- BAL partners with Ecologi to support global trusted climate projects.
- All advisers encouraged to take the climate risk exam as part of BALs commitment to additional education and development.
- BAL is a Real Living Wage Employer, is Disability Committed and is a Dementia Friendly Organisation. All staff receive 2 days per annum for paid volunteering and the company is a corporate sponsor of the Worcestershire Wildlife Trust.
- **PR Enquiries: Giles Cross • Mobile: 07841976458 • Email: gilescross@mail.com**

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