

A better future

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Welcome

At Hymans Robertson, 2016 has been another vibrant year for charitable activity. We won't leave a better future down to chance for the communities we work in.

So we continued to enthusiastically develop our three core charitable areas:

- enhancing financial literacy amongst disadvantaged people;
- supporting employees, individually and in teams with their charitable commitments including matched giving;
- partnering with local communities through volunteering and donations.

The practical highlight this year has been, beyond doubt, the establishment of the Hymans Robertson Foundation as a registered charity in Scotland (SC046931) and England &

Wales (1168951). I am proud to now serve as a Trustee along with a group of charitable-minded colleagues from across the firm. The Foundation provides a focus for all of our charitable activities, helping us grow both the quantity and quality of benefit that we offer to some of the more disadvantaged in our society. An exciting future awaits.

The emotional highlights for the year come from the people: folk at Hymans Robertson being thrilled to find they can really make a difference. And most importantly individuals like Dave on page 8 who said that Fresh Start has helped save his life. What an honour for us to be able to work alongside our partner charities for change like that!



James Entwisle

2016 in numbers



£146,292

TOTAL DONATIONS BY
HYMANS ROBERTSON

£91,235



FINANCIAL LITERACY
PROGRAMME

£25,334



SUPPORTING LOCAL
COMMUNITIES

£29,723



SUPPORTING
EMPLOYEE CHARITABLE
COMMITMENTS

£44,121



EMPLOYEE
FUNDRAISING

1,015 hours



EMPLOYEE
VOLUNTEERING

96+



YOUNG PEOPLE DIRECTLY
IMPACTED VIA FINANCIAL
LITERACY PROGRAMME

68+



CHARITIES
SUPPORTED



2016 - A Year to Celebrate

As James has explained, 2016 has been a landmark year for Corporate Social Responsibility at Hymans Robertson. Levels of enthusiasm and commitment by our people to get involved with the firm's charitable activities constantly amaze me, and are demonstrated by the high levels of volunteering uptake.

2016 also saw the redevelopment of the Hymans Robertson website and we are delighted to now boast a dedicated CSR page. This enables us to share news of charitable activities throughout the course of the year and means this year's annual review is much shorter than our previous review. Please visit us at www.hymans.co.uk/why-hymans/corporate-social-responsibility.

This year we have provided four case studies, one from each office covering our three priority areas:

Enhancing Financial Literacy

We were proud to be runners up in Tomorrow's People's 'Corporate Partner of the Year' category at their Scottish Awards for Achievement, held in Edinburgh last November. The workshops we run in Glasgow continue to be a true success and exemplify the partnering approach we take in enhancing financial literacy. In 2016, we continued our partnerships with TLG The Education Charity, and Tomorrow's People in Barking & Dagenham, running workshops in Edinburgh and London respectively. 2016 also saw us partnering for the first time with The Prince's Trust in Scotland, delivering workshops to young people in Edinburgh. Our partnership with Mencap moved back to its roots in Birmingham, where we provided support and volunteers to run an eight week 'Managing my Money' programme for a group of young ambassadors.

Supporting Local Communities

Our support of local communities is coordinated through our local Helping Hands teams. The activities our staff get involved in are hugely varied and change each year. A highlight from Glasgow is the transformation of the Govanhill Women's Service through a partnership with the Simon Community Scotland. 2016 saw the redecoration of 13 rooms at the Service's women's refuge, as a result of the time and energy of our local teams of volunteers. Our Helping Hands teams continue to support local charities in many other ways, as illustrated with our feature on Edinburgh Helping Hands partnership with Fresh Start.

Supporting Employee Charitable Commitment

We continue to support individual fundraising activities. We believe that if these issues are important to our employees, then they are worthy of our support too, especially when you understand the many and varied personal motivations. Several activities have become part of the calendar, such as the Picken twins' unique annual Fish Supper Ceilidh. Now in its 12th year, Mark, Gavin, and their family's efforts continue to add to the six figure sum they have already raised for a local cancer charity close to their heart. These unique events mix with the usual round of running, cycling and cake baking. However, the range of activities continues to surprise. This year's review features Janiv's unusual angle on taking the central line across London. A fundraiser designed with actuarial precision.

Hymans Robertson is proud to partner with...



Clare Gardner
Head of CSR



Tomorrow's People

2016 marked the third year of Hymans Robertson's partnership with Tomorrow's People, and the first year we partnered with the organisation in Scotland. We were delighted to work with three Tomorrow's People teams across Glasgow, delivering the jointly developed financial inclusion programme, 'Money Matters' as part of Tomorrow's People 'Working It Out' curriculum.

Aimed at 16 – 24 year olds, 'Money Matters' is a three-session programme designed to provide an understanding of essential money skills which will support young people as they transition into employment, training or further education. The workshops are hosted in our London and Glasgow offices, and presented by employee volunteers. Our aim is not only to deliver high quality financial education, but also to offer direct access to the corporate environment and the people who work there.

“I thought it was interesting and learned a lot of new things, and I found that useful.”

Volunteer Story:



I was a bit nervous about committing to volunteering, as I didn't know what would be expected of me. Having experienced a really enjoyable couple of hours I would recommend volunteering to everyone. The group we were hosting were great fun. It was fascinating to hear their views on the world and sadly, some pretty dodgy experiences with unscrupulous employers. If we were able to give them any tips on how to avoid the perils of exploitative businesses and money lenders, it was worthwhile. I was deeply impressed by the young man without any mathematical qualifications or knowledge of tax, calculating marginal tax rates for high earners in his head and faster than I could manage with a calculator!

It's a great way to challenge your perspective on the world and see it from a different viewpoint, which is a refreshing and energising experience. I hope it does some good too and passes along some basic but useful life lessons to young people committed to advancing themselves. ”

Gill Tait, Glasgow



Mencap

In 2016, we were pleased to enter the second year of our partnership with Mencap, supporting the financial education of 18 young people with a learning disability through the delivery of two 'Managing my Money' programmes. These eight week programmes aim to support the independence of young people with a learning disability by providing them with an understanding of the essentials of money, including budgeting, saving, and spending, as well as financial security.

The first of the two programmes was hosted in our London office. Supported by a number of employee volunteers, the Mencap students not only developed their money management skills, but were able to build key core skills and the confidence to enter employment or continue in further learning.

In Birmingham, our volunteers supported the delivery of the second programme at a local college, culminating in a Christmas Fair. Planned and delivered by the Mencap young people, and hosted in our Birmingham office, colleagues turned out in force to shop for Christmas gifts, enjoy some warming refreshments, or chance their luck in the raffle.

We look forward to continuing our involvement with Mencap throughout 2017.

“It has helped me with my (understanding of) finance so I would feel more confident.”

Volunteer Story:



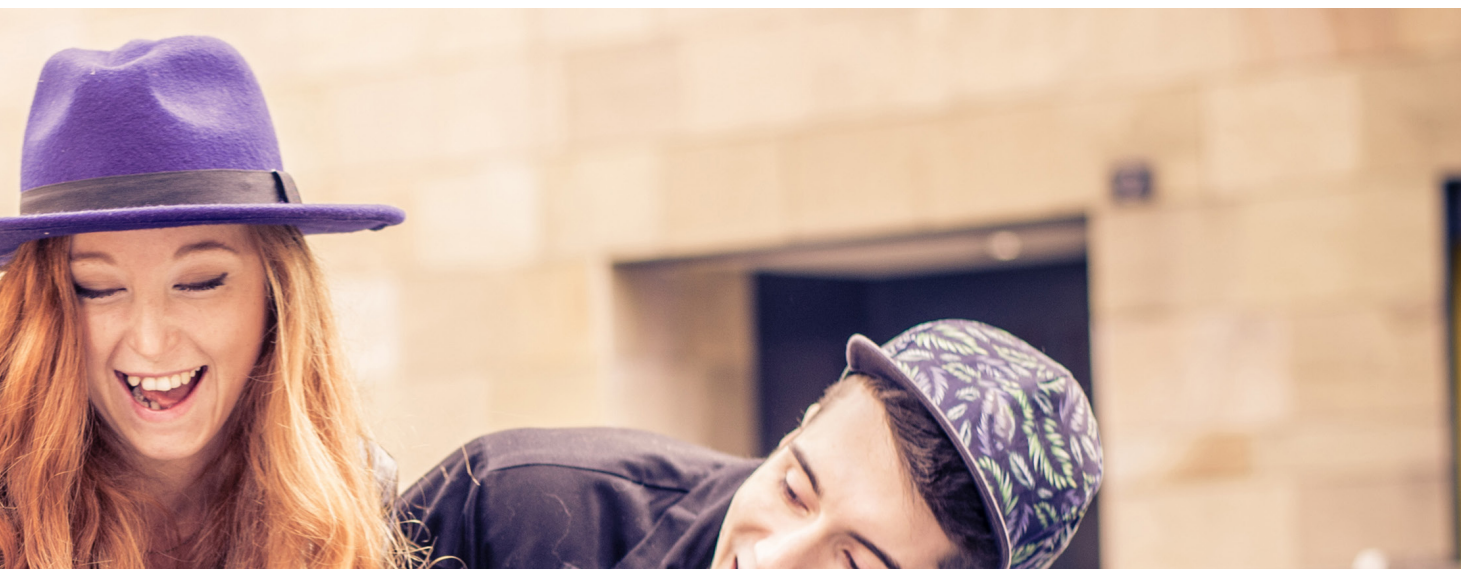
I volunteered to help the Mencap students set up and run their Christmas Fair at our Birmingham Office. This was a bit of a journey into the unknown for me but it turned out to be a wonderfully rewarding experience.

The students arrived mid-morning to set up; by lunchtime we were open for business and doing a roaring trade thanks to the generous contributions from the Hymans Robertson staff. To tempt our buyers, the students (and some of our volunteers!) had spent weeks beavering away on an amazing selection of Christmas cards, book marks and parcel tags. Also on offer were a hot chocolate and marshmallow stall, and a raffle, which everyone seemed to win, even me! Most popular, and amusing, was the seasonally appropriate game of 'pin the tail on the Reindeer'...

The highlight for me was seeing the students presented with their certificates in recognition of all their hard work in making the Christmas Fair such a great success. My advice is, if you get the chance to do something like this, have a go - it's really worthwhile and it makes a difference!



Graham Weaver, Birmingham



Fresh Start (Edinburgh)

Fresh Start is an Edinburgh based charity which offers practical and social support helping people who have been homeless to resettle successfully in to new homes. Hymans Robertson's Edinburgh Helping Hands team has partnered with Fresh Start for a number of years, organising our volunteers to participate in Fresh Start's 'Hit Squads'. The Hit Squad teams work alongside tenants to help decorate their new home.

In 2016, the Helping Hands team chose to further support Fresh Start with a donation to fund a 13 week paid work placement for one trainee graduate of the Fresh Start 'Jump Start' programme. Jump Start offers trainees the opportunity to complete a 12 week programme and gain vocational and generic employment skills, as well as an SQA Personal Development Award. The paid placement helps trainees improve their employment prospects considerably.

The donation made by Hymans Robertson helped Dave, a Fresh Start client, find his feet again:



Dave is in his fifties and had been unemployed for six years; a bad car accident in his youth had eventually taken its toll, forcing him to give up work as a self-employed musician and gardener due to ill health.

Being unemployed had a serious negative impact on his mental health; he particularly missed the companionship of his old band. Dave volunteered to attend our training course, although he was initially sceptical as to how it might help him. Just three months in, however, he was much more positive and jumped at the chance of a temporary post with Fresh Start.

Dave was initially offered a three month post carrying out PAT Testing at our customers' premises. Due to staff changes at Fresh Start we have been able to extend his contract into 2017. Dave says he feels better physically and mentally, and that 'Fresh Start saved his life'.



Keith Robertson,
Managing Director, Fresh Start



We have been supporting Fresh Start for several years, through Hit Squad volunteering and donating toiletries to supply Fresh Start Starter Packs for clients. Hymans Robertson also recruited a member of our Facilities team through Fresh Start a few years ago. We feel the paid placement offers an invaluable opportunity to a Fresh Start client, and we have the chance to make a positive impact on an individual's life.



Helping Hands, Edinburgh



Walk the Central Line

Determined to undertake a fundraising challenge with a difference, one of our London colleagues, Janiv Patel, was inspired to walk the length of the London Underground Central Line, 49 stations in 24 hours – a total distance of 89km (55.5miles) - in aid of the **British Heart Foundation**.

With actuarial planning precision, Janiv plotted the most time-efficient route, and prepared a detailed itinerary to ensure the company of at least one supportive family member, friend or colleague at each stage of the journey.

His day started early at West Ruislip:

“

It was raining and continued to do so for the next twelve hours. Despite this, I made good time initially. At White City I was joined by some Hymans colleagues. In high spirits we marched to St Pauls; such was our enthusiasm we passed Chancery Lane station without realising and had to go back. As the day went on I fell further and further behind schedule, but thanks to a handy online tracker, my companions were able to follow my whereabouts and join me as planned. They were tasked with carrying my rucksack and making sure I stuck to my half hourly routine of 'eat, drink, stretch, repeat'.

I made it to Woodford Station for 1am where I was joined by another supportive Hymans colleague and we reached Debden at 4am. Bearing in mind all five had exams approaching, it was an incredible effort for them to attend, and for which I'm extremely grateful. For the final leg, when it was becoming a struggle, I was cheered along by two old friends. We walked in single file with only the light of a head torch to guide us. With only one more station to go, only Epping Forest lay in the way of my goal. Luckily, being behind schedule was an advantage; the sun was rising as we reached the forest and the picturesque views helped us through the final hurdle. We made it to Epping station at 7am on Sunday, and I had completed my route in 23 hours and 49 minutes. ”

Undeterred by wet weather, unexpected delays, and wrong turns, Janiv raised a fantastic £3,600. When asked if he would tackle the rest of the London Underground he replied, "definitely, maybe"!



Other charities supported

Accord Hospice
Age UK
Alzheimer Scotland
Alzheimer's Research UK
Alzheimer's Society
Arthritis Research UK
Asthma UK
Barnardo's
Beatson Cancer Charity
Bethany Christian Trust
Bield
Birmingham Settlement
Blue Triangle Housing Association
Box Clever Theatre company
British Heart Foundation
Cancer Research UK
Children First
Children's Hospice Association Scotland,
(CHAS)
Crohn's and Colitis UK
Cure Crohn's Colitis
Cystinosis Foundation UK
Defying Dementia
Diabetes UK
East Dunbartonshire Carers Link
English Arts Chorale Association
Face
Farms for City School
Fresh Start
Friends of Tollcross Primary School
Glasgow Riding for the Disabled
Hand in Hand Ethiopia
Hessilhead Wildlife Rescue
Hornchurch PCC
Isle of Man Anti Cancer Association
MacMillan Cancer Support
Médecins Sans Frontières
Mencap
Myeloma UK
Partners UK
PID UK
Pop-n-Grow
Princes Trust
Rangers Charity Foundation
Roald Dahl's Marvellous Children's Charity
Sands
Save the Children
Scope



Scottish Association for Mental Health
Scottish Mountain Rescue
Sense
Shelter Scotland
St Andrew's Hospice
St Columba's Hospice
St John's Hospice
St Margaret's Hospice
Streetwork
STV Appeal
Tackle Africa
Teenage Cancer Trust
The Rotary Clubs of St Albans
The Yard
TLG The Education Charity
Tommy's
Tomorrow's People
Trigeminal Neuralgia Association UK
WaterAid
Waverly Care



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