

FUTURE ASSET

MEMBERSHIP INFORMATION

The most valuable asset in any organisation is its people.

Introducing your future assets.

Join us in our movement to unlock Scotland's potential for the investment management industry



FUTURE ASSET

Introducing Future Asset

Research by Morningstar in 2021* highlighted a staggering fact: in the UK, more investment funds are managed by men called Dave than by women.

Recent analysis by Investment Week** highlights that following the current course, parity of male to female investment managers will be achieved in 2215.

That's very nearly 200 years.
We think it's time to take the bull by the horns...

*[https://www.morningstar.co.uk/uk/news/210141/\(still\)-more-funds-run-by-daves-than-women.aspx](https://www.morningstar.co.uk/uk/news/210141/(still)-more-funds-run-by-daves-than-women.aspx)

**<https://www.investmentweek.co.uk/opinion/4063007/finally-solution-lack-women-fund-managemen>

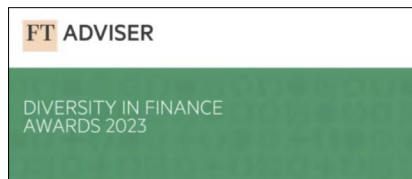
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What we do

Future Asset runs a range of activities that engage, inform and educate school girls about investment management and support them in learning more about the opportunities available for them in the sector.

This year, we have been **shortlisted in FT Adviser Diversity in Finance Awards 2023** in the Diversity & Inclusion Initiative of the Year award | Small firms category.



Your support

Together we are investing in girls and by becoming a member of Future Asset, you'll be joining a community that is working to inform and enthuse girls in Scottish schools and build a pipeline of future talent.

This pack includes all of the information and resources that you will need to maximise your membership as well as learn more about additional opportunities available to sponsors.

If you have any questions or ideas, please contact the Future Asset team at **info@futureasset.org.uk**

www.futureasset.org.uk





The Competition

The Growing Future Assets Competition was launched in 2020 and year-on-year it has grown, engaging more 13–18-year-old girls across Scotland with the support of their teachers and our Investment Mentors.

The annual competition runs over 10 weeks (September – December). Teams of 3 – 6 girls:

- Are matched with a volunteer Investment Mentor
- Choose a company from our selection
- Research and analyse the company
- Produce a written Research Report and Elevator Pitch video outlining their investment case

Winners and runners-up in junior (13-15 years) and senior (15-18 years) categories win cash prizes for their school of up to £1,000, and vouchers for team members.

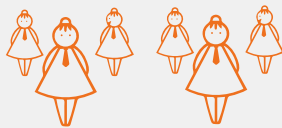
Special prizes are awarded for the best Elevator Pitch Video and ESG Case.

The number of schools registering for the contest is also up by 38%, with almost a fifth of all the country's state schools now engaged in the venture. But we can still do more and with your help, we can go further.



2020

17
teams



13
schools



71
girls

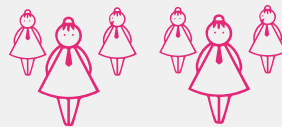


11
mentors



2021

87
teams



411%

52
schools



271%

348
girls



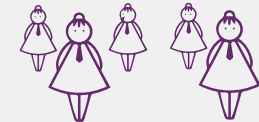
390%

79
mentors
from 28 firms



2022

146
teams



69%

72
schools



38%

651
girls



87%

92
mentors
from 34 firms





Our Mission, Our Vision

Mission

Our mission is to inform girls in Scottish schools about the investment management industry, enthuse them about careers in the sector, and widen the talent pipeline to improve diversity in the industry.

We support girls towards understanding that being female should never be a barrier to pursuing any career whilst helping them to develop skills, confidence and purpose.

“
Achieving genuine sustainable change...will require a multi-pronged approach, tackling multiple barriers to entry and progression, prioritised by strategic need. There is no single action that is the best starting point but the best time to start is now. Each and every firm has a part to play, none can solve the diversity problem alone.
”

New Financial & The Diversity Project report
Diversity in Portfolio Management, 2018

<https://diversityproject.com/resource/diversity-portfolio-management>

Vision

- No girl in Scotland believing that being female is a barrier to their career ambitions
- A shared vision between education and industry that investment management is a suitable career opportunity for girls
- Girls across Scotland leaving school understanding that investment is relevant to everyone, can have a positive impact, and offers fulfilling career opportunities
- Collaboration with our mission from all investment management firms across Scotland

Our Values



www.futureasset.org.uk



Membership

Making the most of our connections

Nominate a Future Asset Champion(s)

Identify a member of your team to be your firm's Future Asset Champion. Commitment isn't onerous in terms of timing but, instead, rewarding and part of a movement making identifiable changes towards equality in the sector.

Inform your colleagues

Tell your colleagues about Future Asset and make them aware of our purpose and the volunteering opportunities we offer. Members of your team can sign up as Future Asset Ambassadors, volunteers who engage and inform students and act as powerful role models.

Ambassadors come from all sectors of the investment management industry, can be male or female, any age and can volunteer to take part in a number of different roles or even suggest their own.

Volunteering with Future Asset can give staff valuable development opportunities whilst building links between firms and the wider community.

To stay in touch, subscribe to our mailing list via the website.

www.futureasset.org.uk/mailling-list

Join our activities

Firms and Ambassadors can work with students in a variety of ways. Details of upcoming opportunities will be shared in our updates.

Speakers

In schools, webinars and events, staff can tell students about their job and how they got there, talk about a topic that ties into a school subject, or present in a variety of themed webinars.

Investment Mentors

Investment Mentors support Growing Future Assets competition teams to develop and present an investment case on their chosen company. An excellent way to share your expertise and develop your coaching skills.

Workshop Facilitators

Your team can join us in our regional workshops, speaking about their roles, helping with games and activities or simply chatting and sharing their experiences.

Host a Workshop or Workplace Visit

Your firm could host a Future Asset event, or invite students to look around your offices, meet your colleagues, and glimpse their future careers!

Work Experience and Internships

We can share your internship opportunities, or support you to welcome a student for the first time.

Developing Resources

Help us to give real insights and bring your work to life by contributing to videos, educational materials and podcasts.

Other opportunities

What else could your firm offer? Whether it's access to your own programmes, providing meeting and event spaces, or something we haven't thought of, we would love to discuss that with you.



Membership

Membership benefits include:

- Becoming part of a growing community of investment management firms working together to inform, educate and support girls across Scotland
- Through your membership, your firm will gain visibility across the Scottish schools' network as desirable places to start a career
- Exclusive invitations to bi-annual member meetings to drive industry change through activities, networking and development work
- Usage rights of all of our membership marketing collateral across your website, email signature and in marketing communications
- Regular posts and mentions across all of the Future Asset social media channels communicating your work to support the charity

What happens to your fee

Your membership fee will directly provide financial support, enabling us to deliver our activities and work further to increase diversity in the industry

Keeping connected

Nomination of a Future Asset Champion within your organisation who will receive membership updates at the start of each school term



Membership costs

Membership of Future Asset is set at a level to make it accessible to all firms

- **£500 per annum for firms with up to 20 employees**
- **£1,000 per annum for firms with over 20 employees**

Want to enable us to do more?

Sponsorship packages start at £5,000 per annum. More details on page 13.

Contact the Future Asset team to discuss membership on info@futureasset.org.uk



Don't just take our word for it

“ Taking part in the Future Assets competition has provided me with so many life skills that I'll take with me forever. I think it's taught me that you need to be so open to all the opportunities that are out there. Investment was something that I didn't know much about and I had no prior knowledge of it... It's improved my communication so much, being able to work as part of the team even though it was with my friends from school, and then also confidence in ourselves. It can be quite a nervous thing the thought of not knowing anything of investment and all of a sudden, you've to present in front of a panel of investment professionals. So just being able to believe in each other and just have that confidence to stand up and present yourself is something that will always be useful in later life.

Ailey Porter, former participant in the Growing Future Assets Competition

“ As part of our Developing the Young Workforce agenda, it's crucial that schools offer such opportunities to their young people as it provides them with an invaluable insight into different industries and facilitates connections with first-class professionals. Our girls who were involved last year gained much from the experience – knowledge, confidence and a unique insight into the world of work – sparking a genuine interest in the investment management sector.

Jon Reid, Rector, Larbert High School

Sponsorship

By increasing your level of investment and becoming a Future Asset Sponsor, you can become part of the change that we are working hard to progress in the industry.

Tailored sponsorship packages start from £5,000 per annum.

Contact the Future Asset team to discuss sponsorship on info@futureasset.org.uk



Here's how we'll work with you to make a difference for hundreds of girls across Scotland:

- We'll support you with your long-term **recruitment** strategy by unlocking a pipeline of the country's finest school-leaver talent. Through our various activities across the year, we work with hundreds of talented girls who are keen to learn more and get involved in the world of investment
- We'll build on your **reputation** as a leading innovative investment firm in Scotland taking positive steps to diversify your workforce, attracting young women from all backgrounds, building an inclusive team by publicising your involvement in our mission as well as sharing the positive impact generated through your involvement with the girls, their families and their teachers.
- We'll join you on your corporate social **responsibility** journey, working with the community and young women and we'll share stories and case studies highlighting your dedication to give back to the community and also to ensuring that you get the best workforce in future.

www.futureasset.org.uk



Don't just take our word for it



Being a Sponsor to Future Asset has been fulfilling for Walter Scott not only in assisting with the clear vision of Future Asset to ensure girls in Scotland should leave school understanding that investment is relevant to everyone, can have a positive impact, and offers fulfilling career opportunities, **it has also allowed our employees to become mentors and enhanced their skills.** We hope by continuing to sponsor Future Asset that this will enable them to continue their work with girls and their teachers in order to provide opportunities to develop skills and gain valuable experience. We would certainly encourage other companies to become a Sponsor

Diane Crichton, Senior HR Business Partner, Walter Scott & Partners Limited



Baillie Gifford have been proud sponsors of Future Asset for several years. We believe the work they do through raising awareness of the investment industry in Scottish high schools is incredibly important for our own long-term success and our industry as a whole.

Our sponsorship is helping to develop and increase the next generation of women investors and is providing young students with access to exciting opportunities and skills development through their annual competition.

Future Asset also provides our own colleagues with an opportunity to give back and develop their own awareness and skills through reverse mentoring the young students.

Sarah Traill, Employee Experience Specialist at Baillie Gifford





At First Sentier we always say we follow our own path and the Future Asset initiative is such a fantastic way to encourage young women to discover a path they may never have known was a possibility for them.

Obviously, we all love the investment business but to see these young minds find out for themselves just what an interesting and satisfying career it can make is just fascinating. The Future Asset programme opens their eyes and is a powerful way for the industry to get young female minds excited about working in the world of investments.

For us, being involved in something that can help shape a new generation of investment experts is so insightful and rewarding. Working with such enthusiastic youngsters, helping them hone their ideas, passions and beliefs into a successful investment case, has been an invaluable and inspiring experience.

First Sentier Investors



Future Asset FAQs

What is Future Asset?

Future Asset is a programme that informs teenage girls in Scotland about investment management, enthuses them about careers in the sector, and widens the talent pipeline whilst improving diversity in the industry. We advocate that being female should never be a barrier to pursuing any career whilst helping them to develop skills, confidence and purpose.

When did Future Asset launch?

Future Asset was established in 2016 by a group of professionals from Edinburgh based investment firms. It launched in September 2017 with a conference for over 400 girls from across Scotland.

How did the idea for Future Asset come about?

The idea stemmed from a lunch hosted in Spring 2016 to discuss Dame Jayne-Anne Gadhia's government- sponsored report **Empowering Productivity: Harnessing the Talents of Women in Financial Services**. Then CEO of Virgin Money, Dame Jayne-Anne challenged the group of investment managers present to promote greater gender diversity in our firms, so we decided we ought to do something about it.

Who runs Future Asset?

Future Asset is directed by a Steering Group of professionals from the investment management sector in Scotland under the auspices of the Didasko Education Company Limited, a regulated

Scottish financial education charity. It is run by a small team with the invaluable support of volunteers from the industry.

Who is on the Future Asset Steering Group?

The Future Asset Steering Group is comprised of a group of primarily female professionals, who are actively engaged in the Scottish financial sector, working mainly in investment management. Drawn from several different firms, members are united in their determination to increase diversity in the sector. We are also advised by our Programme Development Group of educationalists and careers specialists.

How does Future Asset benefit girls across Scotland?

Future Asset runs a range of activities that engage, inform and educate girls about investment management and enable them to consider careers in the sector.

Our annual Growing Future Assets competition challenges teams of girls in Scottish schools to research, analyse and pitch a company for investment to a group of industry professionals. The competition aims to introduce girls to the world of investment as well as the range of careers available.

We also produce educational resources, run events for students and teachers, and support students to gain work related experience.

Do you ever plan to expand out of Scotland?

We don't plan to extend Future Asset outside Scotland, but we are keen to collaborate with others who have the same mission and work closely with a number of similar projects.

How is Future Asset funded?

Future Asset is a trading name of the Didasko Education Company Limited, a financial education charity registered in Scotland. Future Asset is funded by the generous support of investment management firms who are committed to increasing diversity in the industry and backed by a family charity.

Who are Didasko Education Company Limited?

Founded by Professor Russell Napier and supported by the generosity of a number of benefactors, Didasko Education Company Limited is a charity that believes in the power of education in driving change in the financial sector, among professionals and the wider public. They have a unique approach to financial education, with a focus on financial history, and a style that celebrates the joy of learning.

They offer a practical history of financial markets course online, and in an in-person setting twice a year and manage Edinburgh's unique Library of Mistakes. **www.libraryofmistakes.com**

www.futureasset.org.uk



Keep in touch

Our team will send termly Member Updates to the Future Asset Champions keeping you up to date on what we have achieved and informing you of forthcoming plans and opportunities for involvement. Please ensure that key messages are shared through your internal communication channels and share your involvement with Future Asset on social media.

If you have any questions or ideas, please contact the Future Asset team at info@futureasset.org.uk

Share our message

Use the Future Asset Member logo in our Brand Assets pack in your marketing materials to show your commitment to improving gender diversity in investment management.

When referring to FA we would recommend you use the following summary/text:

Future Asset is a programme that informs girls in Scotland about careers in investment management, enthuses them about opportunities in the sector, and widens the talent pipeline whilst improving diversity in the industry

Social media

Future Asset is on the following social media channels:

 @Future_Asset

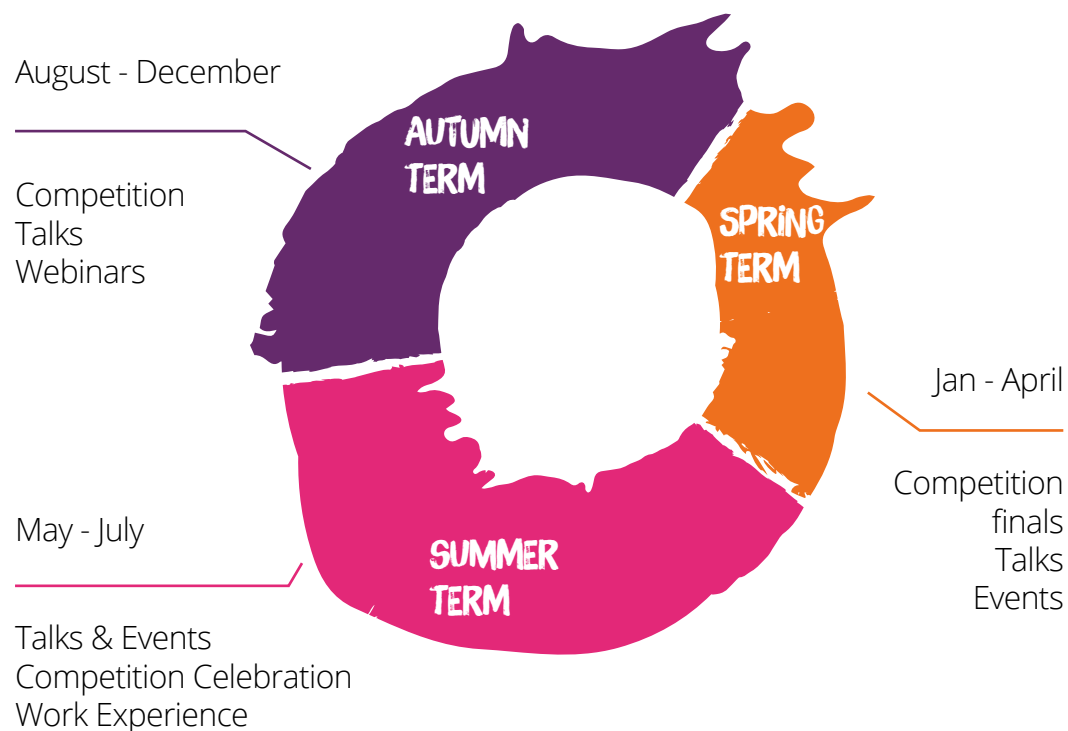
 future_asset

 @FutureAsset

 Future Asset

Please follow, like, share and tag us in your own posts.

The Future Asset year

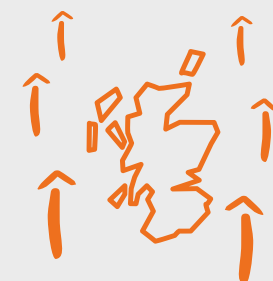


Plans for 2023/24 include



Development of an online Learning Management System to provide access to sector-based information and learning tools regardless of location or background.

Additional support and guidance for schools, teachers and mentors.

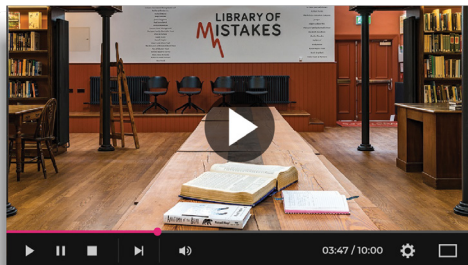


Expanding the reach of competition even further.

Helen Bradley
Future Asset Executive Director

Helen would be delighted to speak to you and your staff about opportunities with Future Asset and the benefits we could bring your firm.

Please take a look at our 2022 Investment Competition Celebration video on our website, which will give you a wonderful insight into the real world impact of participation.



www.futureasset.org.uk/

If you have any questions or ideas, please contact the Future Asset team at info@futureasset.org.uk

