Case study: Supporting the wellbeing of our people

By Perpetual Sustainability
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At Perpetual, we invest in supporting the wellbeing of our people, so they can thrive at work and at home. We provide a range of wellbeing programs and initiatives for all our people, aimed at enhancing their physical, mental, social and financial wellbeing.

In 2024, Perpetual hosted a number of “Resilience and Wellbeing to Thrive” workshops that were available to all our people across the Perpetual Group. These were designed to provide our people with essential skills and strategies to help them with their mental fitness, boost resilience and navigate change at work and in all aspects of their lives. Approximately 500 of our people enrolled in the workshops across our businesses globally.

To further support the wellbeing of all our people across the Group, we also provide them with access to:

- Headspace – a meditation app - for themselves and up to five family members,
- A wellbeing self-assessment and action planning tool, and
- A local Employee Assistance Provider.

In addition, our Perpetual Group people based in Australia and Singapore can access the following employee benefits:

- Wellbeing and Community Leave: this additional two weeks of leave is available to people who have worked with Perpetual Group for at least 12 months in the Australian or Singapore business. This leave can be used to engage in activities that are meaningful to them, such as extending a holiday, spending time with loved ones, or doing an activity of their own choice[1].
- Free financial health checks.
- A $275 Wellbeing Allowance: an annual payment to support the physical and mental wellbeing of our people in a way that is meaningful to them. During the 2024 financial year, more than 1000 people used this allowance for gym memberships and classes, home office and ergonomics, nutrition tools, and counselling support.

Several of our Boutique businesses also offer additional tools or programs to support the wellbeing of their people in their respective businesses, as outlined below:

- In the US, TSW offers mindfulness coaching to all associates via group, or individual sessions, provided by The Peavey Project. This is a specialist organisation that provides individuals and teams with practical tools to enhance mental health and daily performance.
- Barrow Hanley adopted Perpetual Group's post-pandemic initiative to give employees the option to work remotely for one month per year. The timing and location are at the discretion of the individual and approved by their team leader.
- In FY23, J O Hambro provided Mental Health First Aid training to a group of their people. This certification encompassed practical skills to identify the triggers and signs of mental

health issues and provide tools to allow mental health first aiders to be confident in starting a conversation and guiding a person to appropriate support.