

Case study: Supporting the wellbeing of our people

By Perpetual Sustainability
26 August 2024



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 choice¹.
- 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.

This information has been prepared by [Perpetual Investment Management Limited \(PIML\)](#) ABN 18 000 866 535, AFSL 234426. It is general information only and is not intended to provide you with financial advice or take into account your objectives, financial situation or needs. You should consider, with a financial adviser, whether the information is suitable for your circumstances. To the extent permitted by law, no liability is accepted for any loss or damage as a result of any reliance on this information.

The information is believed to be accurate at the time of compilation and is provided in good faith. This document may contain information contributed by third parties. PIML does not warrant the accuracy or completeness of any information contributed by a third party. Forward looking statements and forecasts based on information available at the time of writing and may change without notice. No assurance is given that the forecast will prove to be accurate, as future events may impact actual results and these could differ materially from those anticipated. Any views expressed in this document are opinions of the author at the time of writing and do not constitute a recommendation to act.

The Product Disclosure Statement (PDS) for the relevant funds, issued by PIML, should be considered before deciding whether to acquire or hold units in the Fund. The PDS and Target Market Determination can be obtained by calling 1800 022 033 or visiting our website www.perpetual.com.au.

No company in the Perpetual Group (Perpetual Limited ABN 86 000 431 827 and its subsidiaries) guarantees the performance of any fund or the return of an investor's capital. No allowance has been made for taxation and returns may differ due to different tax treatments. Past performance is not indicative of future performance.