greenspace Impact Report
2025/2026

Let's talk about Your Legacy

greenspace

Certified B Corporation

01. Our Roots

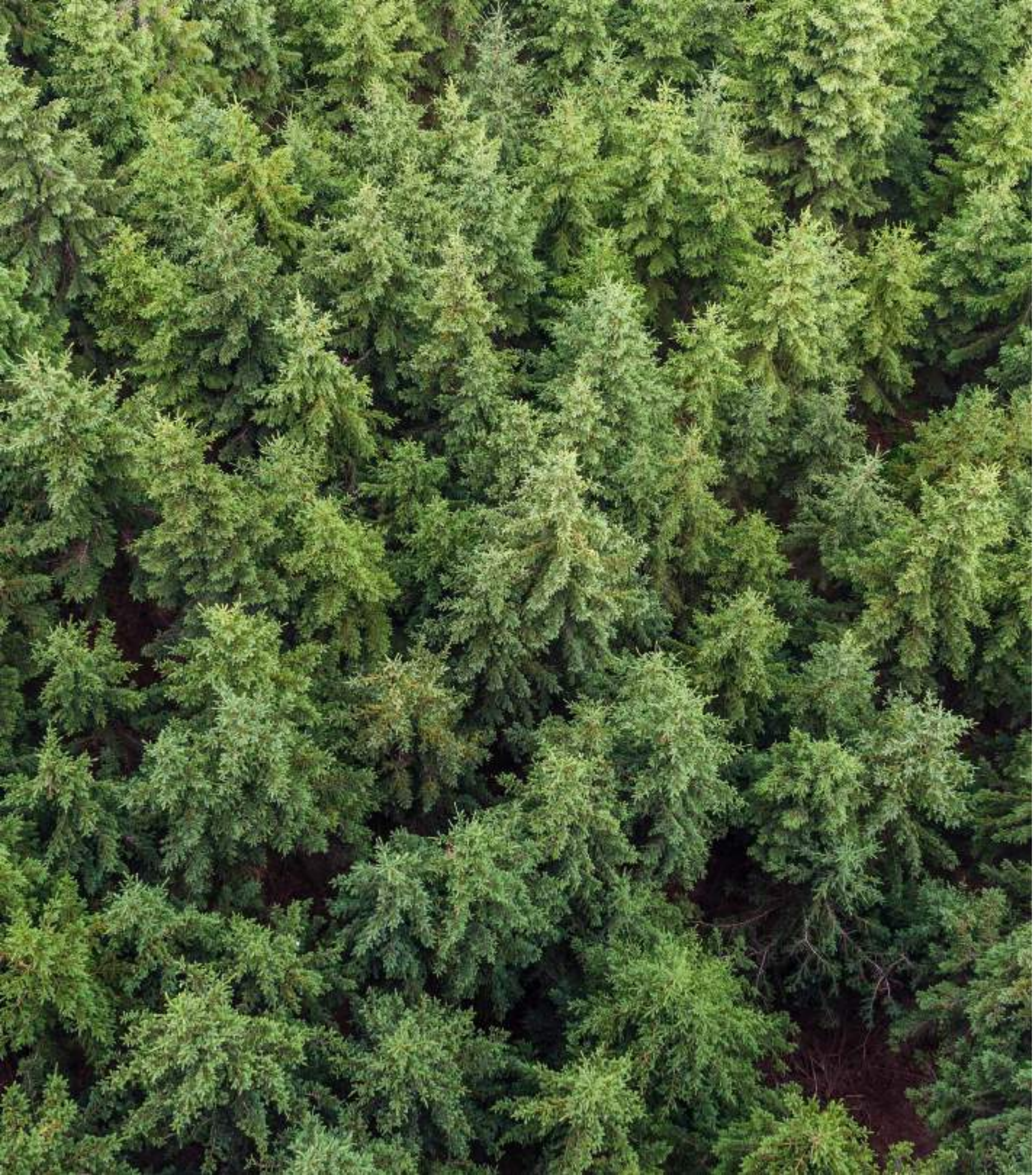
02. Planting for Purpose

03. Nurturing a Brighter Future

04. Growing Continually

Our Roots

2020 - present



Our aim is to help the UK to transition to a sustainable economic model

Who are Greenspace

- A boutique, directly authorised financial advice firm
- Motivated by making a positive difference
- Champions of impactful investments
- South Coast-based servicing the UK
- Certified B Corp

What we do

- Align personal values with pension pots and investments
- Educate all generations + business owners
- Promote financial wellbeing + security
- Bridge the gap between savings + sustainability
- Plant seeds for our future generations

We were making the bigger picture worse for as long as we continued business as usual

Dan Old
Co-founder

Meet our founders

Marc Buckley

Dan Old

We founded Greenspace in 2020 as we had reached a crossroads in our personal and professional lives. We were experienced investment advisers but had spent years becoming increasingly frustrated that the processes within our industry still more or less ignored everything outside shareholder cost, risk, and return.

We saw trillions of dollars invested without any consideration of the natural world and the communities which ultimately support all markets and businesses. The system was not sustainable and we, and our clients, were making the bigger picture worse as long as we continued with ‘business as usual’.

We want to give future generations a chance of inheriting a world they can improve too

Greenspace exists to help the transition to a happier, sustainable economic model. We're striving to set a better example, promote more responsible investment and give future generations a chance to inherit a world that they, too, can improve and pass on.

Since our last Impact Report, £1,915,683 of new money has been screened for sustainability and impact criteria. We’ve planted 212 trees with Treeapp as part of our rewilding project in the Scottish Highlands, helping to create habitats for wildlife and restore forests for the future.

This is our third year as a certified B Corp after transitioning from B Corp Pending. Our values are present throughout the business, from our articles of association to every process we have in place as an FCA-authorised financial advice business. Here’s a snapshot of our journey as we continue championing financial well-being.

Planting for Purpose

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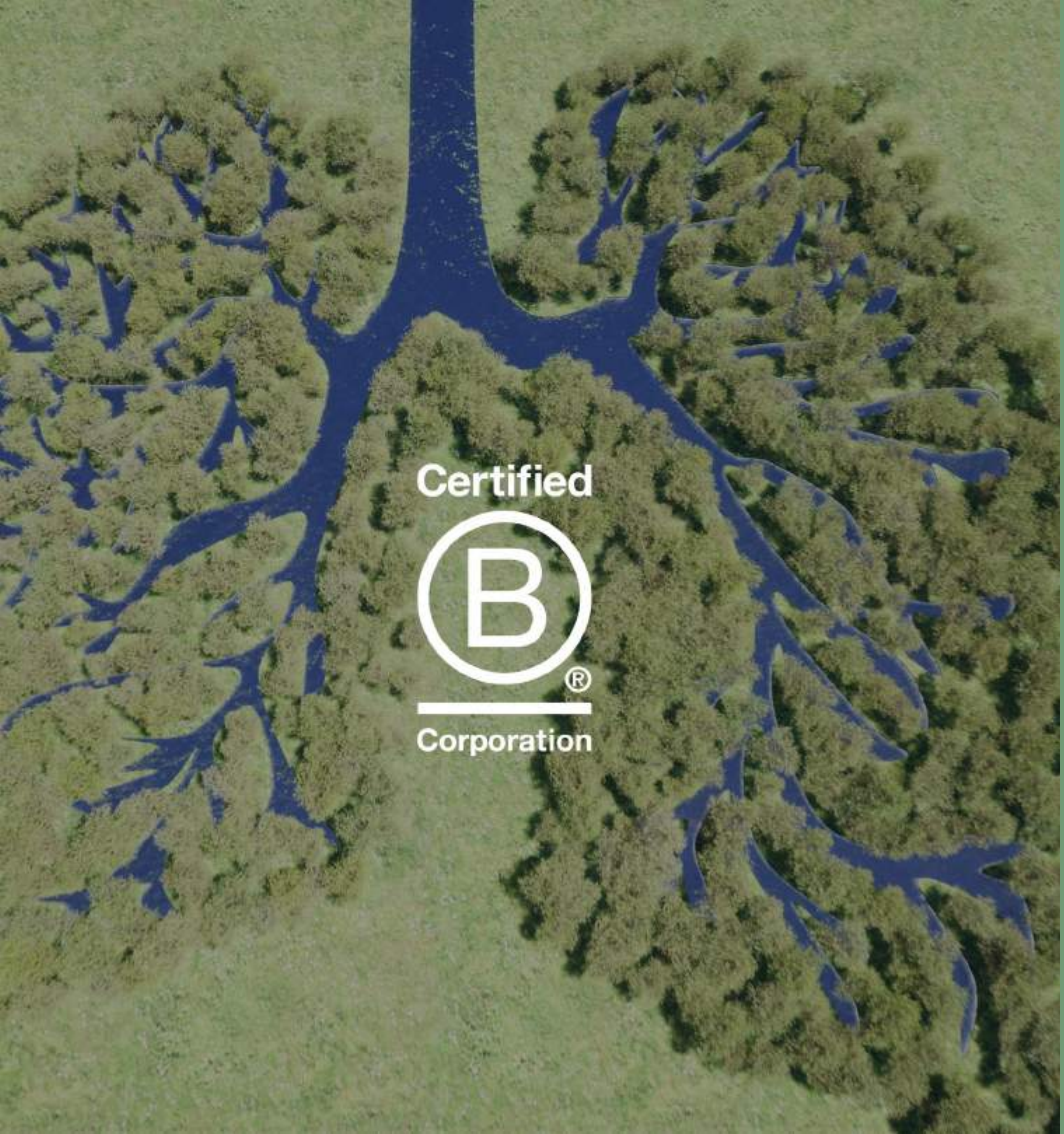


Certified
B Corporations
(B Corps) are leaders in
the global movement
for an inclusive,
equitable, and
regenerative economy

What is B Corp?

A B Corp is a business that has achieved B Corp Certification by proving that it meets the highest standards of social and environmental performance, transparency, and accountability.

B Corp Certification is based on a company's actions and its ongoing commitment to improvement.

B Corps must...

- Demonstrate high social and environmental performance by achieving a B Impact Assessment score of 80 or above across five categories: Governance, Community, Environment, Customers, and Workers.
- Make a legal commitment to a positive impact on people and planet by showing accountability to all stakeholders within its company articles.
- Be transparent in their performance and continual improvement by publishing an annual impact report.

Our B Corp journey

2020

Greenspace Financial Planning founded

2020/2021

B Corp Pending achieved

2022

B Corp Certified. Score 83.2

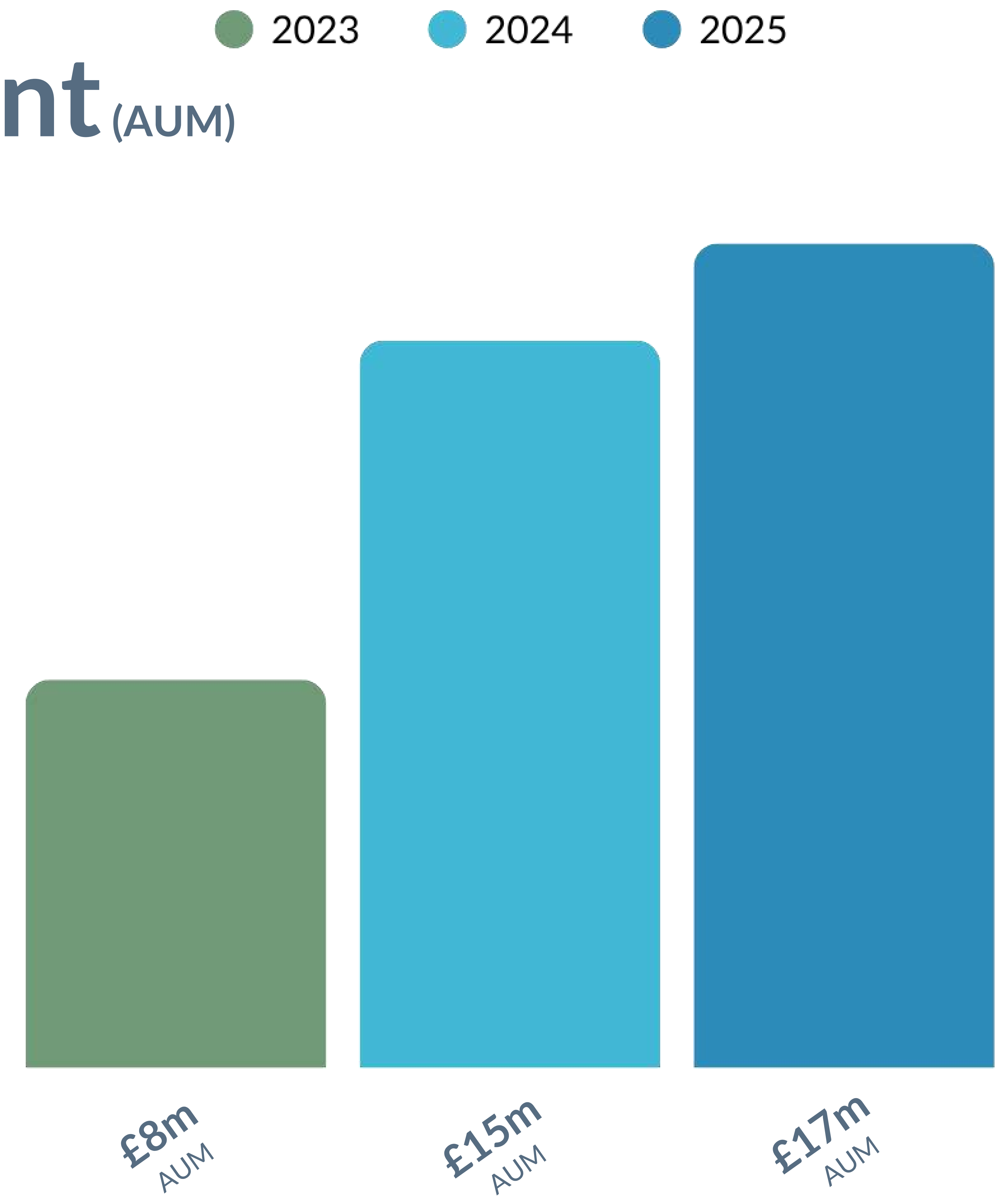
2025

B Corp Recertification. Score 107.7

Assets under management (AUM)

Each year our impact grows.

We now screen more than £17 million for sustainability and positive impact, meanwhile our clients continue to grow their contributions to sustainable and positive impact investments each month.



Committed from the outset

1

Elevating accountability

2

External verification

3

Genuine authenticity

We want to be held accountable to our commitment to authenticity and responsibility. From the very beginning we recognised the importance of attaining B Corp status and pledging ourselves to a higher standard of external validation and ongoing responsibility.

Ongoing legacy of B Corp

B Corp certification provides us with a framework to ensure a continuing positive impact on people, planet and profit, alongside a legal commitment to a material positive impact.

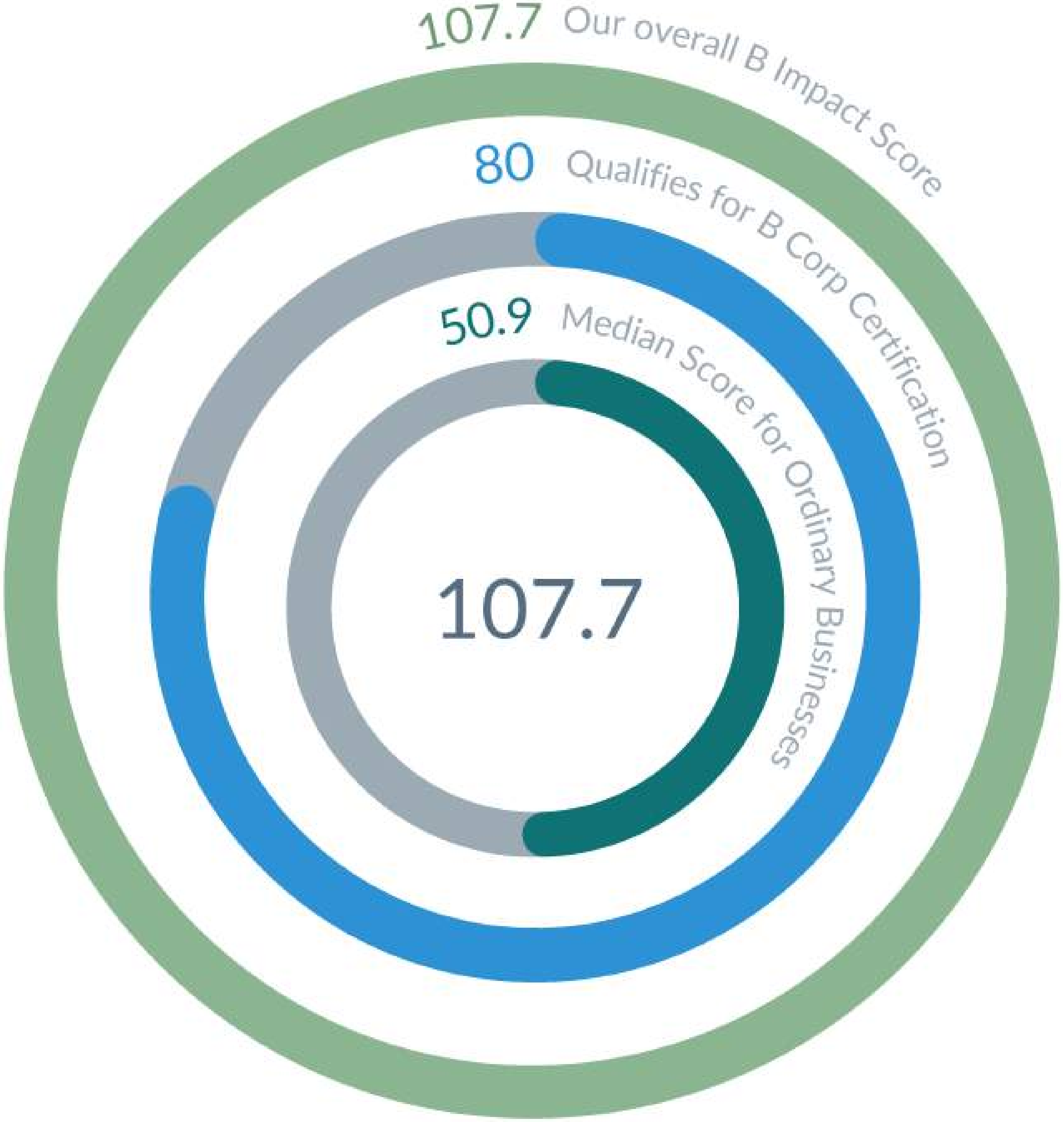
By being a B Corp we are reminded to pause and consider the wider world with every business decision we make, not just the immediate, quickest, most direct profitable solution.

Certification has had a huge proportionate impact for us. An overwhelming amount of new business has been as a direct result of our B Corp Pending, and then Certified status. Our pipeline is buoyant with new clients who proactively sought us via the B Corp community or were recommended to us because of a B Corp conversation within their networks.

Our Score + Goals

Our B Corp Verified Score

Workers category is not applied as we do not have employees.



Nurturing a Brighter future

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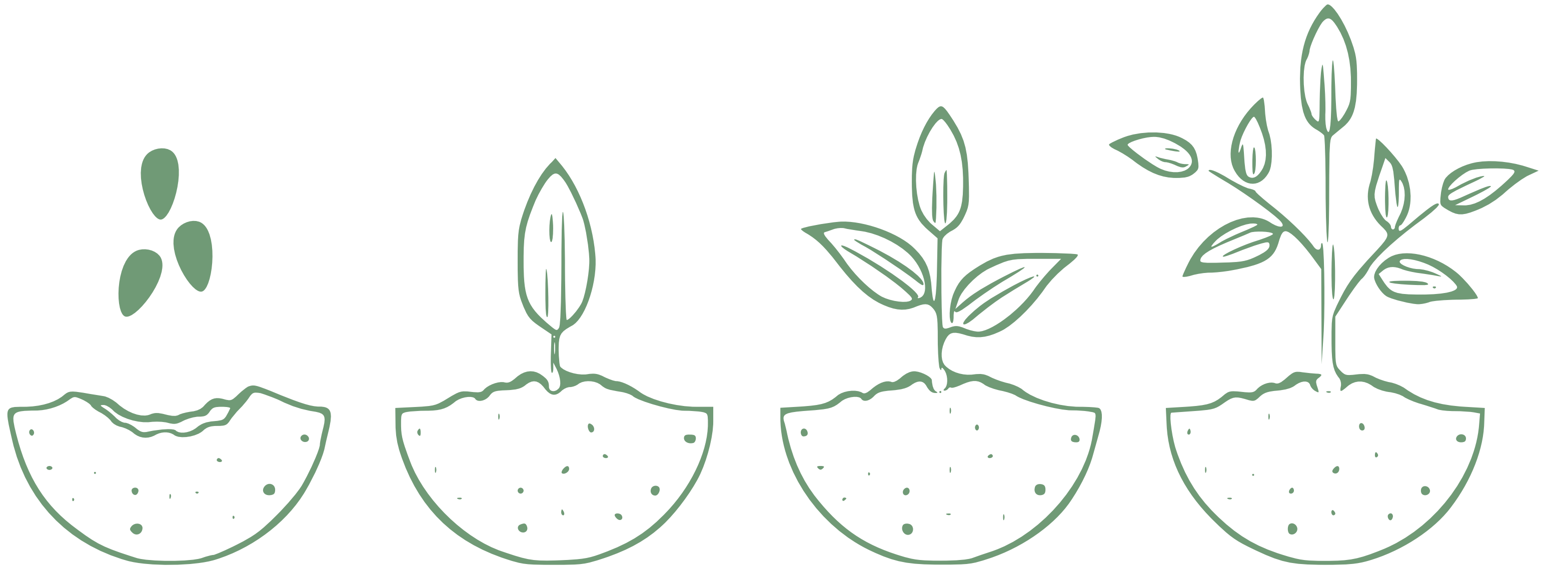
‘68% of UK savers want their investments to consider people and the planet alongside profit’

Make My Money Matter

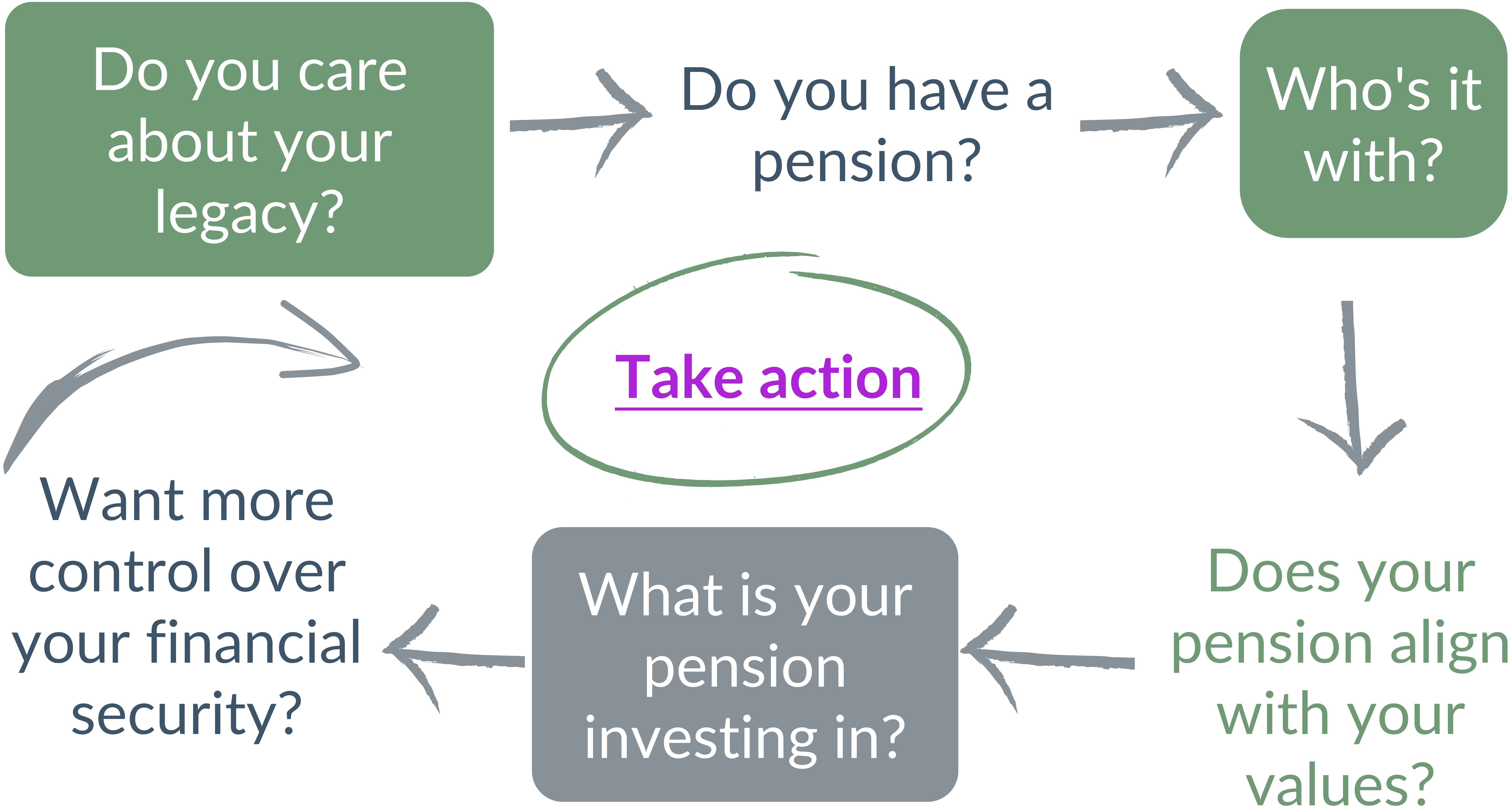
Mission Statement

We aim to move £1-billion of ‘unscreened’ assets currently held in UK pensions and investments into funds which meet sustainable or positive impact screening criteria

Parent?
Business owner?
Pension holder?
Saver?



We're challenging you to learn and take accountability of what your money does and the impact it has on people and the planet.


Do you care about your legacy?
Do you have a pension?
Who's it with?
Does your pension align with your values?
What is your pension investing in?
Want more control over your financial security?
Take action

Traditional investing

- Primarily based on financial performance, risk and cost.
- Minimal (if any) screening on ethics or sustainability.
- Onus on investor to opt out of investments that could, by default, include fossil fuels, firearms, mining, and tobacco.

VS

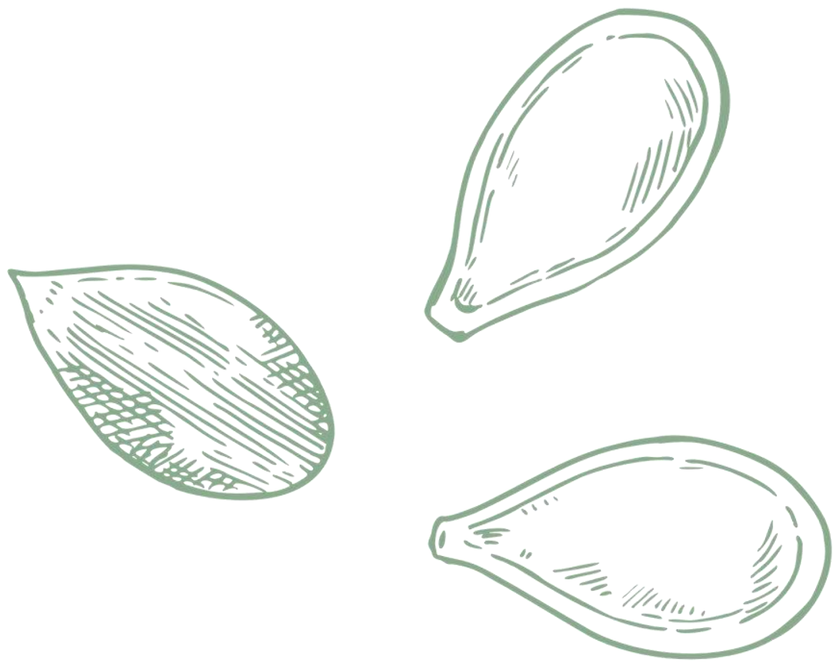
What we do

- Switch your pension or investment into funds which meet sustainable or positive impact criteria.
- Align them with financial security and wellbeing.
- Apply screening to all investments and companies.
- Transfer your pensions and investments into ESG, impact, SRI or ethical funds.

Financial wellbeing, sustainability, and profitability do not need to be mutually exclusive

Company Pensions As a Force For Good

Automatic enrolment into a workplace pension marked its twelfth year in October 2024. All employees aged 22 or over are automatically enrolled into a pension by their employer. Millions of employers and employees contribute to the pension every month. This is a HUGE opportunity to improve investment trends. **We can help you make sure:**



- Your workplace pension is working for the well-being of all stakeholders
- Your workplace pension is more cost effective and tax efficient
- Your workplace pension helps you achieve or maintain B Corp status

Glossary

Unravelling our jargon

Terms have yet to be defined by the FCA so to avoid greenwashing here's what we mean...

ESG SCREENING

Environmental, social, and governance (ESG) refers to a set of standards used to screen a company's behaviour prior to investment. 100% of our assets are ESG screened.

GREEN

Green investing seeks to support business practices that have a favorable impact on the natural environment.

ETHICAL

Ethical principles are used as the primary filter to seek investments that align with the investor's views and values.

IMPACT

Impact investing aims to generate specific beneficial social or environmental effects in addition to financial gains.
A positive impact report is required.

Glossary

Unravelling our jargon

What do the terms we refer to, mean?

SOCIALLY RESPONSIBLE INVESTMENT (SRI)

Socially responsible investing is the practice of investing money in companies and funds that have positive social impacts.

SUSTAINABLE

Sustainable investing directs capital to companies that seek to combat climate change, environmental destruction, while promoting corporate responsibility.

SPECTRUM OF CAPITAL

The Spectrum of Capital is a tool used to help understand a person's values and aligning these with investments available.

RESPONSIBLE

Responsible investment acknowledges environmental, social and governance factors, and of the long-term health and stability of the market as a whole.

Greenspace Spectrum of Capital

We use this tool to help ascertain your values as well as your investment appetite to risk, cost, and performance

Approach	Traditional	Responsible	Sustainable	Impact: Finance first	Impact: Impact first	Philanthropy
Financial objectives	Competitive risk-adjusted financial returns				Sub-market returns tolerated	Capital loss, partially or in full
		Stewardship active engagement and comprehensive responsible voting				
				Address societal challenges with material impacts measured + monitored		
ESG focus	Little to no regard for ESG. Goals are purely for financial, ignores adverse impact.	Absence of harm. Negative screening, reflecting values.	ESG integration. Manages risk + pursues thematic opportunities.	Prioritises return while also generating a positive impact.	Prioritises impact with returns profile that is not competitive.	Funds impact initiatives that are unable to generate return for investors.

We advise on solutions between these areas only

*Adapted from EdenTree 2023 + Bridges Fund Management 2015

'Moving the national average pension wealth to a sustainable fund is 21 times more effective than the combined annual carbon savings of switching to a renewable energy provider, substituting all air travel with rail travel and adopting a vegetarian diet.'

(Source: Make My Money Matter in partnership with Aviva)

Before working with Dan at Greenspace Financial, I had very little understanding of the impact my personal workplace pension had on people and the planet. Like many, I was auto-enrolled into a workplace pension without knowing where my money was being invested or the potential impact. Dan and the team at Greenspace changed that completely.

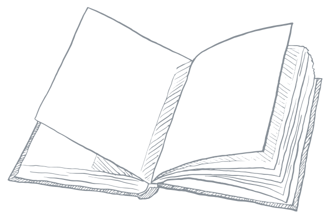
Through their expertise and guidance, I now have full transparency over my investments and can confidently say that my money is supporting causes I care about, all while preparing for my future. I'm grateful for the peace of mind that comes with knowing my investments align with my values, and I couldn't have done it without Dan's support. If you're looking to make a positive impact with your investments, I highly recommend reaching out to Dan and the Greenspace team.

Amelia Chubb
Koha Marketing

Growing Continually

2025: What we’ve achieved

Governance



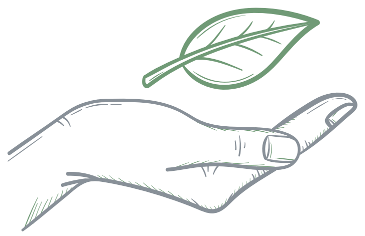
Our Articles of Association (a company’s core legal rules) include a commitment to people and planet. We have made this a permanent, legally binding part of how the business is run.

Environment

Through investments, our environmental impact has reduced emissions by 4,904 tonnes of CO_2 - the equivalent of flying from London to New York 8,000 times this year. We have partnered with Treeapp, contributing to global rewilding projects. So far, we’ve planted 212 trees. We have committed to planting 5 trees for every new client, and then 1 tree every year after.

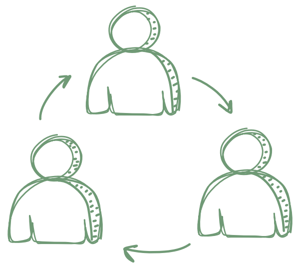
2025: What we’ve achieved

Community



We have provided more than 65 pro bono hours of advice and facilitation to clients for whom our standard fees would have been a barrier, or who faced vulnerability challenges.

Customers



We have started collaborative relationships with employers who wish to use their companies to improve the well-being of their employees via improved pension schemes.

I organised a call with Dan as dealing with my pension had been on my to do list for longer than I’d like to admit. I had an old work pension and no idea where it was invested or if it was suitable for my financial needs.
I also had some inheritance money to invest and had started reading up on responsible investments. It was a minefield!

Dan did a brilliant job at explaining complex financial data simply. He was always happy to answer any of my many questions and made the whole process seamless.

I’m really relieved to know that my money is invested responsibly, and it’s taken away the stress of worrying about future financial security.
My only regret is that I didn’t speak to Dan sooner!

Nancy Hyne
True Horizon

2025/2026

Our Goals

1. **Financial**: Move £5 million more new invested money into funds which meet sustainability or positive impact criteria.

2. **Education**: improve access to knowledge within workplaces including owner and employee consultations.

3. **Awareness**: raise profile of impact investing through the Greenspace brand via marketing campaigns.

4. **Pro bono**: strengthen existing Big Issue partnership and increase number of pro bono hours.

We're sowing seeds for a brighter, happier future, and overall financial wellbeing

Thank you

TAKE ACTION

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