

**FINDEX**



**OUR STORY,  
OUR FUTURE**

**FY2023–2027 Sustainability Strategy**

# Our Story, Our Future: Findex 2022–2027 Sustainability Strategy

## 02 About this strategy

---

05 **The story so far**  
Inclusive workplace  
Findex Community Fund  
Renewable future  
Ethical investing

---

10 **Our strategy**  
Trusted by clients to be honest  
and efficient  
Driven by passionate people  
Grounded in communities  
Impactful, ambitious and responsible

---

25 **Epilogue**  
Governance and reporting

This is an interactive PDF. Click on the pages to navigate!



# FINDEX



## About this strategy

Findex works with our people, clients and communities as a partner for the challenges of today and tomorrow. We're invested in their story and tailor solutions that consider every chapter. At the core of our business is a mission to help our clients and the people we work with to thrive. We deliver unrivalled and integrated trusted advice backed by broad expertise, strong community relationships and leading-edge technology.



**For us, sustainability is about doing right by people and the planet by ensuring that what we do today helps create a better world for tomorrow.**

We understand that a strong sustainability strategy is essential to delivering value in today's world. Findex is committed to deepening our understanding of our impact and to evolving our business to meet the needs of our people, and the clients and communities we serve, without compromising the ability of future generations to thrive.

This sustainability strategy sets out a range of innovative initiatives designed to have meaningful and lasting impact for the communities we are connected to. This strategy builds on our values, vision, and purpose. It is true to who we are and what we stand for.

Our strategy reflects our commitment to the three core elements of sustainability: **Environmental, Social and Governance.**

We've developed four pillars that express who we are:



Click on the pillars to jump to that page 

# FINDEX



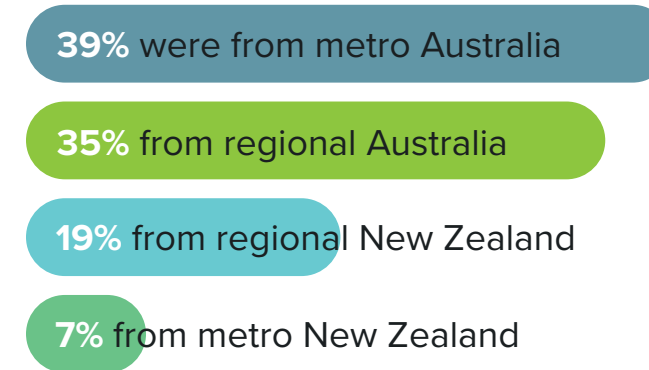
This strategy is structured around these four pillars which outlines our sustainability visions out to FY27. The visions under each pillar represent how Findex wants to be seen by our **employees, clients and stakeholders** at the completion of this strategy (30 June 2027). Our strategy also describes the actions we will take to achieve them, and the ambitious targets we will reach for along the journey.

Findex undertook a materiality assessment to understand what issues, risks and opportunities are **most important to the people we work with, and to our business.** The process involved extensive engagement. Every member of our 2,700-strong team had the opportunity to share their views, and an independent survey of clients and suppliers helped ensure we understand their needs.

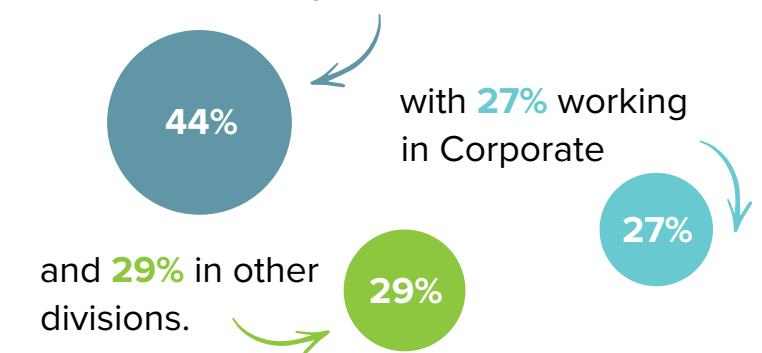


Amongst internal stakeholders there were **292** survey responses.

Of those completing the survey:



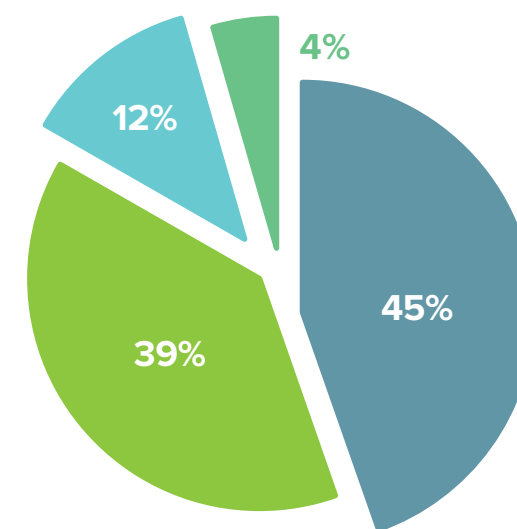
The majority of respondents (**44%**) worked in our Accounting and Tax Division,



Amongst external stakeholders, the majority (**566**) of the 852 responses received were from Findex clients.



A small number (**286**) of suppliers, business partners and investors or financial institutions also responded.



More than **45%** of external stakeholders were from regional Australia, **39%** were from metro Australia, **12%** from regional New Zealand and **4%** from metro New Zealand.

The results of the materiality assessment have strongly informed this strategy. For our clients and suppliers, and for our team, clear priorities emerged. **Clients** told us that **excellent products and services** and a commitment to doing **honest** business and acting with **integrity** mattered most to them. **Our team** told us that they valued an **inclusive workplace** that fosters **diversity** and attracts and retains **great people**. And across **our team, suppliers, and clients**, maintaining our strong connection with, and commitment to **community** is important. Finally, **stakeholders and leaders** prioritised action on **climate change** and noted that Findex has an important role to play in **protecting the environment** and using our **purchasing power responsibly**.

# FINDEX



## The story so far

This is Findex's first sustainability strategy, but it is not the first chapter in our sustainability story.



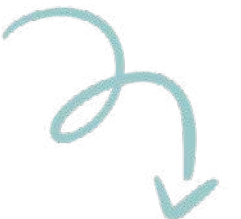
**We have a long-standing promise to creating a positive impact for our clients, our team, and the communities in which we live and work.**

We have already taken action to address our environmental footprint and to help to leave a safe, healthy, and thriving world for generations to come.

This strategy builds on strong foundations, from our commitment to ethical investing to our support for team members returning to the workplace after a career break. Whether it's meeting our energy needs with renewable solar power, or investing in innovation in the diverse communities we work in, Findex is already making a positive impact.

This strategy sets ambitious targets and describes the actions Findex will take in the coming years. These actions will ensure that we meet our stakeholders' expectations and continue to play our part as a leader, a trusted adviser, a partner, and an employer. In doing so, we aim to empower innovative and inclusive communities and to support a thriving environment for generations to come.

**See some examples of the leadership that Findex is already demonstrating over the next few pages.**



# FINDEX



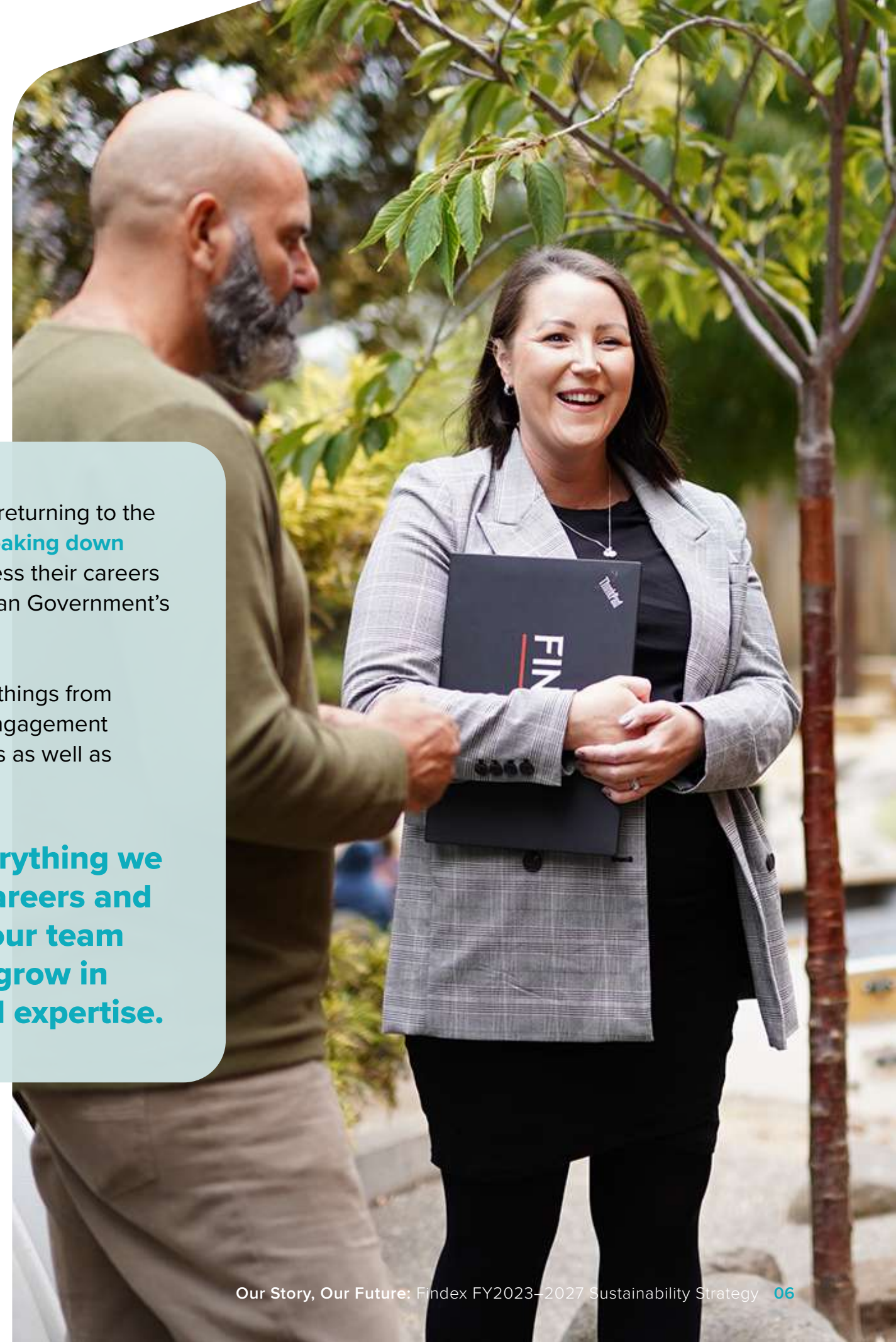
## Inclusive workplace

We know that women can face significant barriers when returning to the workplace after a career break. We are committed to **breaking down those barriers** and supporting talented women to progress their careers in Findex. That is why we are participating in the Australian Government's Career Revive program.

As part of the program, we are re-examining how we do things from workforce planning and job design to recruitment and engagement strategies. We are looking at our policies and procedures as well as our career pathways and mentorship programs.



**Findex is committed to doing everything we can to help women revive their careers and to help ensure every member of our team is included and supported as we grow in diversity, flexibility and unrivalled expertise.**



# FINDEX



## Findex Community Fund

The Findex Community Fund (FCF) was established in February 2018. The FCF has a vision to **create equal access to opportunity** in the areas of health, education, and entrepreneurship. Its goal is to address the limitations for rural and regional communities and more broadly across Australia and New Zealand.

Since 2018, the Fund has worked with and empowered charities that improve the lives of patients and their carers through access to health care. To date the fund has donated over **\$2.56 million** (as at 30 June 2022) and empowered young people and supported communities to work towards a successful and sustainable future.

The FCF put a spotlight on tackling isolation and strengthened its vision to create equal access to opportunities.

The FCF Community Donating Program leverages the ingrained **community-first culture** of Findex to identify various needs throughout Australia and New Zealand, creating real impact for those in need. At the same time, the Fund's Workplace Gifting Program, extends support to a diverse range of charities throughout Australia and New Zealand to support our regional network of communities.

Examples of the kinds of donations made by FCF include scholarships for Indigenous students, grants for young people in rural areas to support them into further education, and financial support to provide children with food, clothing and health and hygiene items.





# FINDEX



## Renewable future

With over 100 offices across Australia and New Zealand, Findex requires a large amount of energy.



**To reduce the carbon footprint and costs of meeting our energy needs, we piloted solar power for several offices in 2018.**

Starting with an assessment of which offices were best suited to solar installations, offices in Cairns, Inverell and Forbes were chosen for the first phase of this program. An investment of over \$92,000 (AUD) was made, with installations paying for themselves in savings in less than three years.

The clean energy generated means that less fossil fuels are used, resulting in lower greenhouse gas emissions. As a result of Findex's investment, around **120 tonnes of CO2 is saved** per annum – the equivalent of taking around 25 cars off the road each year.



# FINDEX



## Ethical investing

We believe that Environmental, Social & Governance ('ESG') considerations are material to investment risk management and performance outcomes. Therefore, we are **committed to integrating ESG factors** into our investment analysis and decision-making process.

Findex has a long-standing commitment to responsible and ethical investing. From seeding ESG managers such as AXA IM Sustainable Equity Fund in 2014 to launching the DNR SRI ex Fossil Fuels direct equity mandate in 2015 our commitment has been uninterrupted.

The majority of our Active Managed Discretionary Account (MDA) fund managers apply ESG overlays and assess material ESG issues. More than half are members of United Nations Principles for Responsible Investment (UNPRI) and two are Responsible Investment Association Australia (RIAA) certified.

We are committed to tackling some of the biggest issues facing our world, and our fund managers are no different. We are constantly improving our practice and raising our ambition, allowing us to address issues from climate change and resource depletion to environmental degradation and pollution, and to **support positive investments** in renewable energy, occupational health and safety, human rights, corporate culture and ethical governance.



**FINDEX**



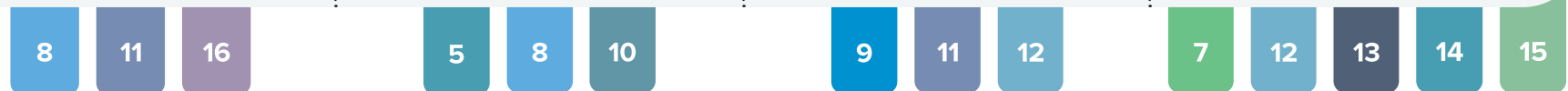
**OUR STRATEGY**



**Our mission: We act with integrity and purpose to empower innovative and inclusive communities and to support a thriving environment for generations to come.**

Who we are	Trusted by clients to be honest and efficient	Driven by passionate people	Grounded in communities	Impactful, ambitious, and responsible
<p><b>Our values</b></p>	<p>We earn the trust of the clients we serve through doing honest business with integrity and efficiency. We grow through innovation and leading-edge technology and we have strong roots in our community.</p>	<p>We ensure every member of the Findex team is included and supported as we grow in diversity, flexibility and unrivalled expertise. We welcome new voices and ideas to create a meaningful and lasting impact together.</p>	<p>We are proud to be part of the communities we serve. We invest in regional communities, support local entrepreneurs, and respect the wisdom and cultures of Aboriginal and Torres Strait Islander and Māori peoples. Communities are better for having known us.</p>	<p>We act responsibly and create a positive impact on the environment. We are ambitious and impactful in our climate action, supporting current and future generations to thrive.</p>
<p><b>Findex visions</b></p>	<ul style="list-style-type: none"> <li>• Our business is driven by our innovative, high-quality services. New clients seek us out because of our strong reputation.</li> <li>• Technology drives efficient processes and systems across our business and supports excellence in data protection and privacy, including new security approaches and accreditations.</li> <li>• We retain existing clients through excellent services and attract new clients through our expanded, sustainability-aligned advisory and wealth management services.</li> <li>• We are an accessible and inclusive organisation.</li> </ul>	<ul style="list-style-type: none"> <li>• Our people are proud to work at Findex. Our people strategies, staff networks and transparent and accountable communications on diversity and inclusion mean that new talent seeks us out.</li> <li>• We attract and retain quality talent and expertise. Our inclusion-focused initiatives such as staff training and volunteering build greater understanding of social and environmental sustainability and mutual respect.</li> <li>• We support staff to work flexibly and stay healthy and safe.</li> <li>• Our team is knowledgeable about climate change and resilient to its impacts.</li> </ul>	<ul style="list-style-type: none"> <li>• We support growing populations and economies in regional communities through investment, job creation and support for local business and community endeavours. Our sustainability agenda expands our services and support for communities.</li> <li>• Our Reconciliation Action Plan and Māori Engagement Plan for Australia and New Zealand guide respectful engagement.</li> <li>• Our social and environmentally responsible procurement policy and support local resources help inform community investment.</li> <li>• Through our sustainability-aligned communications, communities know and trust our brand through peer-to-peer networks and trusted local advocates.</li> </ul>	<ul style="list-style-type: none"> <li>• Our TCFD-aligned financial disclosures and our exploration of other disclosures mean we play our part in acting transparently on climate risk.</li> <li>• Our ambition on climate change is recognised by independent voices and is in line with the latest climate science.</li> <li>• Our responsible investment services provide lasting value for new and existing clients.</li> <li>• Findex reduces its environmental impact by reducing our consumption of natural resources.</li> <li>• We demonstrate our commitment to sustainability and human rights by becoming a UN Global Compact Signatory.</li> </ul>

**SDGs**



Findex is committed to supporting the United Nations (UN) Sustainable Development Goals (SDG). These global goals established a shared plan for sustainability around the world. The table below shows where our strategy aligns with specific targets within these goals. The following pages provide more detail on the actions we will take to help achieve them.



SDG	Relevant targets	How this strategy contributes
<b>5 Gender equality</b>	5.1, 5.4, 5.5, 5.c	<ul style="list-style-type: none"> <li>We will develop and deliver a new diversity and inclusion strategy by the end of FY25. We will continue and expand our Career revive program and support women to progress their careers through mentoring and CPD.</li> </ul>
<b>7 Affordable and clean energy</b>	7.2	<ul style="list-style-type: none"> <li>We will purchase renewable energy for our office locations in both New Zealand and Australia.</li> </ul>
<b>8 Decent work and economic growth</b>	8.1, 8.2, 8.3, 8.4, 8.5, 8.6, 8.7, 8.8, 8.9, 8.10	<ul style="list-style-type: none"> <li>Findex drives economic growth and prosperity through supporting our clients to build and maintain wealth, including through leading edge technology. This strategy further supports economic growth in regional communities, drives job creation and youth employment, supports greater financial literacy, drives entrepreneurship, and reduces the environmental impacts of economic growth.</li> </ul>
<b>10 Reduced inequalities</b>	10.2, 10.3, 10.4	<ul style="list-style-type: none"> <li>We will develop and deliver a new diversity and inclusion strategy by 2025, including a review of all relevant Findex policies and practices including recruitment with a view to driving inclusion.</li> </ul>
<b>11 Sustainable cities and communities</b>	11.4, 11.6, 11.a, 11.b	<ul style="list-style-type: none"> <li>We will develop and publish a Reconciliation Action Plan and Māori Engagement Plan for Australia and New Zealand including provisions on respecting cultural heritage. We will help build community resilience to climate change by supporting clients on their sustainability journeys and we will continue to support economic development in rural and regional areas.</li> </ul>
<b>12 Responsible consumption and production</b>	12.2, 12.5, 12.6, 12.7, 12.8	<ul style="list-style-type: none"> <li>We will develop and publish a responsible procurement policy and increase our investment in impact-driven businesses. We will introduce new policies to phase out single-use plastics at Findex events and make our events and travel more sustainable.</li> </ul>
<b>13 Climate action</b>	13.1, 13.3	<ul style="list-style-type: none"> <li>We will develop and publish an ambitious emissions reduction strategy and targets, improve our financial disclosures on climate-related topics, and support climate resilience amongst our staff, clients, and the communities we serve.</li> </ul>
<b>14 Life below water</b>	14.1	<ul style="list-style-type: none"> <li>We will develop new actions on waste reduction and resource efficiency, including action to reduce marine debris such as ocean plastics via phasing out single use plastics at events via developing and publishing our Plastic Free Events Policy.</li> </ul>
<b>15 Life on land</b>	15.1, 15.2, 15.3, 15.4, 15.5, 15.6, 15.7, 15.9. 15.a, 15.b	<ul style="list-style-type: none"> <li>Our new responsible procurement policy will also direct investment into positive environmental projects including regeneration initiatives.</li> </ul>
<b>16 Peace, justice and strong institutions</b>	16.5, 16.6, 16.10, 16.b	<ul style="list-style-type: none"> <li>We will strengthen our business ethics and integrity and build on the trust that clients have in us, including through staff training and development, and transparent reporting and disclosures on material topics.</li> </ul>

# FINDEX



## Trusted by clients to be honest and efficient

Findex is proud to be a trusted adviser and partner to more than 250,000 clients across Australia and New Zealand. **Acting with honesty and integrity is at the heart of everything we do.** We strive to meet the highest standards of good governance. We prioritise excellent customer service, quality and innovation in all we do, and prioritise efficiency in service delivery.

Our clients told us that product and service quality, innovation, and business ethics and integrity are all material topics for them.

This pillar sets out our targets in these areas for a five-year period to the end of FY27.

Our Values:

**We earn the trust of the clients we serve through doing honest business with integrity and efficiency. We grow through innovation and leading-edge technology and we have strong roots in our community.**





## Trusted by clients to be honest and efficient



### Vision Statement 01:

**Our business is driven by our innovative, high-quality services. New clients seek us out because of our strong reputation.**

#### Target

- Findex has achieved certification that demonstrates its commitment to ESG by the end of FY27.
- 100% of C-Suite and Executive Leaders are provided access to training in relation to ethics in line with Findex's 'Cultural Refresh' program by the end of FY24.
- 100% of staff are provided access to training in ethics in line with Findex's Cultural Refresh Program by the end of FY24.



### Vision Statement 02:

**Technology drives efficient processes and systems across our business and supports excellence in data protection and privacy, including new security approaches and accreditations.**

#### Target

- Findex Group has obtained ISO 27001 certification 'Information Security Management' by the end of FY25.
- 100% of clients are aware of our data protection, security and privacy practices and services by the end of FY27.



## Trusted by clients to be honest and efficient



### Vision Statement 03:

**We retain existing clients through excellent services and attract new clients through our expanded, sustainability-aligned advisory and wealth management services.**

- Target**
- Achieve and maintain an annual Net Promotor Score (NPS) of at least 65%.



### Vision Statement 04:

**We are an accessible and inclusive organisation.**

- Target**
- Develop and launch an Accessibility Plan by the end of FY25.



# FINDEX



## Driven by passionate people

**Our 2,700+ staff are the driving force** of Findex. Our vision is to build an empowered and engaged workforce that ‘revolutionises wealth and empowers ambition’. Including growing and developing our leaders, enabling our people to live the Findex values and convey the purpose in our communities and building adaptability and agility to respond to the changing world.

Through our materiality assessment, we know that important issues for our team include **talent attraction and retention, inclusion, diversity and engagement**, and maintaining a healthy, safe and respectful workplace that **supports staff wellbeing**.

This pillar sets out our targets in these areas for a five-year period to the end of FY27.

Our Values:

**We ensure every member of the Findex team is included and supported as we grow in diversity, flexibility, and unrivalled expertise. We welcome new voices and ideas to create a meaningful and lasting impact together.**





## Driven by passionate people

### Vision Statement **05:**

**Our people are proud to work at Findex. Our new people strategies, staff networks and transparent and accountable communications on diversity and inclusion mean that new talent seeks us out.**

#### Target

- New Diversity & Inclusion (D&I) Strategy developed and launched by the end of FY25.
- Establish at least one new staff network and a committee to oversee staff networks by the end of FY23.
- Findex supports an annual event in line with our D&I Strategy focus areas.
- By the end of FY27 Findex achieves a professional services 'inclusiveness' 'Loop' rating within the top 25% percentile.
- A majority of applicants for jobs at Findex are aware of our D&I policies and activities by the end of FY25.
- Establish an internal recognition program for staff that have made contributions to Findex's Sustainability Targets by the end of FY25.





## Driven by passionate people

### Vision Statement **06:**

**We attract and retain quality talent and expertise. Our inclusion-focused initiatives such as staff training and volunteering build greater understanding of social and environmental sustainability and mutual respect. We respect and protect human and labour rights.**

#### Target

- 100% of agreements are assessed for Modern Slavery risk by procurement staff. Findex key procurement staff are engaged and understand Modern Slavery compliance requirements.
- 40% of staff, including the C-Suite and Executives take up volunteering opportunities by FY27.
- 100% of C-Suite and Executive Leadership have accessed and completed relevant sustainability training modules in FindexIQ by the end of FY26.
- 100% of staff have access to sustainability training modules in FindexIQ aligned to our Sustainability Strategy by the end of FY26.

### Vision Statement **07:**

**We support staff to work flexibly and stay healthy and safe.**

#### Target

- Findex achieve ISO 45003, the global standard for managing psychological health within the workplace, by the end of FY25.

### Vision Statement **08:**

**Our team is knowledgeable about climate change and resilient to its impacts.**

#### Target

- 100% of C-Suite and Executives undertake annual climate change training by the end of FY24.
- 100% of staff have access to carbon literacy and climate change training by the end of FY27.
- Findex holds annual climate change webinar to promote client initiatives and Findex's climate change and emissions reduction achievements by the end of FY24.



## Grounded in communities

With offices widely dispersed around Australia and New Zealand, **communities are the lifeblood** of our business and Findex is committed to making a meaningful contribution within them. What makes us unique is our connection to the communities we serve. We are part of those communities – members of the local sports teams, parents at the local school, and active, trusted participants in community life.

Staff, clients, suppliers and partners told us that they value our connection to community and our commitment to empowering regional entrepreneurship.

**We value and respect Aboriginal and Torres Strait Islander and Māori peoples** who have cared for country and community for millennia. Findex is committed to reconciliation with, and empowerment of Aboriginal and Torres Strait Islander and Māori communities.

This pillar sets out our targets in these areas for a five-year period to the end of FY27.

Our Values:

**We are proud to be part of the communities we serve. We invest in regional communities, support local entrepreneurs, and respect the wisdom and cultures of Aboriginal and Torres Strait Islander and Māori peoples. Communities are better for having known us.**





## Grounded in communities



### Vision Statement **09**:

**We support growing populations and economies in regional communities through investment, job creation and support for local business and community endeavours. Our sustainability agenda expands our services and support for communities.**

#### Target

- At least one annual financial inclusion campaign run in regional areas where Findex operates by the end of FY27.



### Vision Statement **10**:

**Our Reconciliation Action Plan and Māori Engagement Plan guide respectful engagement across Australia and New Zealand.**

#### Target

- Develop and publish a Reconciliation Action Plan by the end of FY24.
- Develop and publish a Māori Engagement Plan by the end of FY24.



## Grounded in communities



### Vision Statement 11:

**Our responsible procurement policy and support local resources help inform community investment.**

#### Target

- Update the Procurement Policy to advance economic, environmental and social objectives aligned with Findex's Sustainability Strategy. Develop an ESG procurement checklist by the end of FY23.
- Findex offices have access to resources to support and run 'support local' campaigns by the end of FY27.

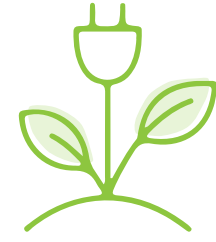


### Vision Statement 12:

**Through our sustainability-aligned communications, communities know and trust our brand through peer-to-peer networks and trusted local advocates.**

#### Target

- Community hub launched by the end of FY26.



## Impactful, ambitious and responsible

At Findex, we believe that the best way to predict the future is to create it. As climate change worsens and its impacts are felt by an increasing amount of people, we understand that it is up to all of us to **take action today to protect tomorrow**. We are committed to playing our part in creating a safe future where people and planet thrive.

Through engagement with our team, clients and suppliers in shaping this strategy, we heard the call to improve our action on climate change and environmental protection.

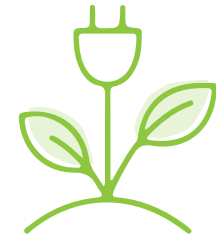
Our stakeholders also told us that they believe Findex has a powerful role as a purchaser and that there are opportunities for us to create even more positive impacts through **responsible and ethical procurement**.

This pillar sets out our targets in these areas for a five-year period to the end of FY27.

### Our Values:

**We act responsibly and create a positive impact on the environment. We are ambitious and impactful in our climate action, supporting current and future generations to thrive.**





## Impactful, ambitious and responsible

### Vision Statement **13:**

**Our Task Force on Climate-Related Financial Disclosures (TCFD)-aligned financial disclosures and our exploration of other disclosures mean we play our part in acting transparently on climate risk.**

#### Target

- Findex publish disclosures in line with the TCFD recommendations and complete scenario analysis by the end of FY27.



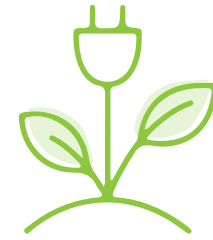
### Vision Statement **14:**

**Our ambition on climate change is recognised by independent voices and is in line with the latest climate science.**

#### Target

- Findex sets and publishes targets for greenhouse gas emissions reduction by the end of FY23.
- Findex sets its carbon neutral ambition by FY23.
- Findex achieves carbon neutrality from FY24 onwards.
- Findex develops and launches a Renewable Energy Purchase Plan including targets for New Zealand and Australia by the end of FY23.
- Findex reports its carbon footprint annually.
- Findex undertakes a 'Work from Home' green energy offering feasibility by the end of FY24.





## Impactful, ambitious and responsible

### Vision Statement **15:**

**Our responsible investment services provide lasting value for new and existing clients.**

#### Target

- 50% of the Investment Managers approved for adviser use are Responsible Investment Association Australasia (RIAA) and or signatories to the United Nations Principles for Responsible Investment (UNPRI) by the end of FY27.
- SRI policy published by 2024 and reviewed every two years.

### Vision Statement **16:**

**We demonstrate our commitment to sustainability and human rights by becoming a UN Global Compact Signatory**

#### Target

- Findex is a UN Global Compact Signatory by the end of FY25.

### Vision Statement **17:**

**Findex reduces its environmental impact by reducing our consumption of natural resources.**

#### Target

- Findex has developed a sustainable events policy and checklist by the end of FY24.
- Findex has developed a sustainable travel policy and checklist by end of FY23.
- Findex has incorporated sustainability requirements into its Property and Leasing Strategy by the end of FY23.
- Plastic Free Events Policy developed by the end of FY24.
- Undertake a waste audit of a metropolitan and regional office annually.
- Develop and promote an 'Active Travel' Guide for Findex staff in Australia and New Zealand by the end of FY23.
- Responsible Paper Procurement Plan developed and launched by FY23.

# FINDEX



## Epilogue

**This strategy marks an important chapter in the Findex story. We are turning a new page and writing the story of our shared future.**

This strategy has grown from our strong roots in communities across Australia and New Zealand. It builds on the excellent products and services that our clients value, and it demonstrates our ethics and integrity. It acknowledges that Findex is driven by our team of passionate, diverse and capable people. It sets our intention to be an ambitious, responsible and impactful leader and to empower innovative and inclusive communities whilst supporting a thriving environment for generations to come.

### Governance and reporting

This strategy and its delivery will be overseen by Findex's ESG Steering Committee. The Committee's memberships are drawn from senior leaders and Board members from across the business. The Committee will undertake an annual review of the strategy and ensure that its implementation, monitoring, evaluation and improvement is consistently managed in every part of the business.

We will report against this strategy annually and in alignment with both the UN Sustainable Development Goals and the Global Reporting Initiative (GRI) standards for reporting.

# FINDEX



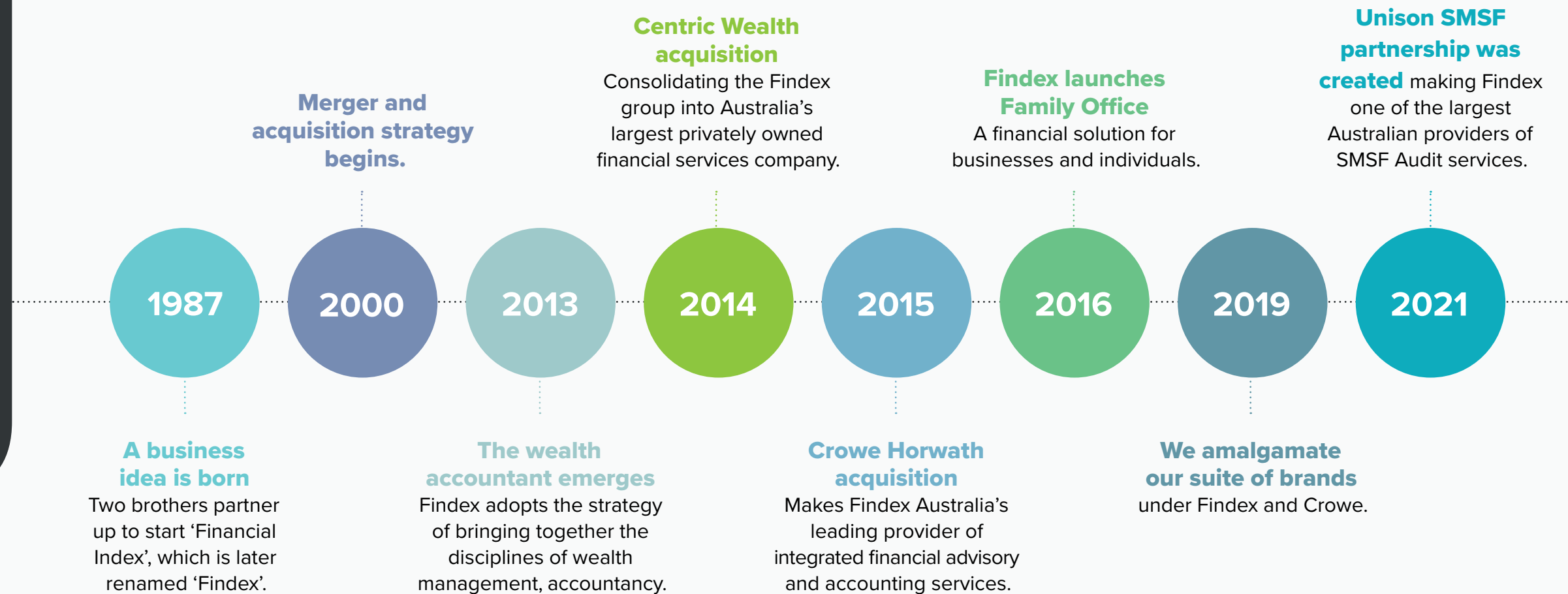
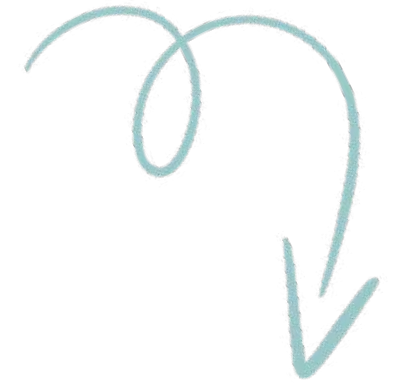
## Our Story, Our Future – Our Brands

Our sustainability strategy covers and incorporates the Findex Group Limited brands.

# FINDEX

Findex Group Limited (Findex) is one of the largest privately owned providers of integrated financial services and advice in Australia and New Zealand. Findex enriches the lives of the people, businesses and communities we work with through smart solutions, a one best way approach and an integrated delivery method via our Family Office model.

**Our evolution into Findex is shown below.**



# FINDEX



In 2015, Findex acquired Crowe Australasia, a member firm of Crowe Global. Now, as a wholly owned business of the Findex Group, Crowe Australasia leverages its global network to provide specialised support to local and multi-national organisations undertaking international projects, helping them navigate the rapidly changing local and global tax and regulatory landscape with confidence.

[crowe.com/au](https://crowe.com/au)  
[crowe.com/nz](https://crowe.com/nz)

## FINDEX *Community Fund.*

Launched in 2018, the FCF's purpose is to create equal access to opportunity for people isolated by location or circumstance. The FCF collaborates with partner charities across Australia and New Zealand to deliver programs that are regionally relevant, nationally impactful and globally scalable in the areas of Health, Education and Entrepreneurship.

[findex.com.au/community-fund](https://findex.com.au/community-fund)  
[findex.co.nz/community-fund](https://findex.co.nz/community-fund)



Centric is an investor directed portfolio service (IDPS) designed to address Australia's fractured fintech ecosystem.

The Centric platform enables the provision of wealth management services, giving a single view of assets, liabilities, transactions and reports (including tax) in one place. It is designed to support both investors as well as their financial advisers, accountants and other representatives.

[centricwealth.com.au](https://centricwealth.com.au)



A Findex initiative to empower regional entrepreneurship across our network.

FoundX provides upfront value to local start-ups and small businesses through business mentoring and engaging and informative meet ups and events tailored to entrepreneurs.

[foundx.com](https://foundx.com)



Australia's first national agtech innovation hub, based in Melbourne.

SproutX is an agtech business accelerator. It offers support, access to capital and distribution channels for entrepreneur start-ups in the agricultural sector.

[sproutx.com.au](https://sproutx.com.au)



As one of the largest Australian providers of SMSF Audit services, Unison is the trusted and experienced audit partner that accounting firms, SMSF administrators and wealth management firms depend on to help them thrive in a complex regulatory environment.

[unisonfg.com.au](https://unisonfg.com.au)

# FINDEX



Findex Group Limited ABN 40 128 588 714 (Findex)

While all reasonable care is taken in the preparation of the material in this document, to the extent allowed by legislation Findex accept no liability whatsoever for reliance on it. All opinions, conclusions, forecasts or recommendations are reasonably held at the time of compilation but are subject to change without notice. Findex assumes no obligation to update this material after it has been issued. You should seek professional advice before acting on any material.

Crowe Global is a leading international network of separate and independent accounting and consulting firms that are licensed to use "Crowe" in connection with the provision of professional services to their clients. Crowe Global itself is a non-practicing entity and does not provide professional services to clients. Services are provided by the member firms. Crowe Global and its member firms are not agents of, and do not obligate, one another and are not liable for one another's acts or omissions.

© 2022 Crowe Global

Findex (Aust) Pty Ltd, trading as Crowe Australasia is a member of Crowe Global, a Swiss Verein. Each member firm of Crowe Global is a separate and independent legal entity. Findex (Aust) Pty Ltd and its affiliates are not responsible or liable for any acts or omissions of Crowe Global or any other member of Crowe Global. Crowe Global does not render any professional services and does not have an ownership or partnership interest in Findex (Aust) Pty Ltd.

© Findex Group Limited 2022. All rights reserved.

22 July 2022