CATELLA

APAM

BENEFITS & BEYOND

An introduction to the culture, benefits and opportunities within Catella APAM

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Our employment offer is designed to support you. Read on for details of our enhanced benefits and perks.

How you are valued and rewarded
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How you are empowered
An introduction to our inclusive culture which enables you to be yourself in an environment where you can SpeakUp.

How you are encouraged to develop
Details of our annual training and development programmes including study support and charitable initiatives.

How you are part of the team
An introduction to our "people team", office-based culture and referral bonus scheme.

We Dare To Be Different, Do You?

An introduction to Catella APAM Benefits & Beyond

This brochure has been designed to help you understand what a career at Catella APAM really feels like and explains how you can benefit, both personally and professionally, from your experience with us.

Our package is made up of competitive salary, enhanced benefits, real time and long-term recognition and reward schemes plus formal training and support programmes. This gives you the opportunity to grow your package with your career.

Diversity is our strength

We are committed to supporting you to develop both personally and professionally with the business. We'll encourage you to be yourself and we recognise, and indeed embrace, that everyone is different. We work as a team but blend our skills to deliver the best outcome for our clients.

Values Driven

We expect you to be future focussed, show entrepreneurial spirit and, demonstrate our values in everything that you do. We have high expectations and require you to be conscious that everything you do has an impact on others. This builds our team culture and enables us to make a real difference in everything we achieve together.

Ensure you speak to HR if you have any queries or would like to register for a specific scheme or training programme.

Human Resources – Charlie Barclay, Freya Baldrey & Georgia Duncan-Gill

E: Recruitment@apamuk.com | hr@apamuk.com

OneTeam

Being a member of the Catella APAM team means being a part of the UK group including Bankfoot APAM and Vantage Zero, as well as Catella APAM Ireland. We work collaboratively to offer a diverse range of services to our clients and to support our combined growth as a Group.

Options for Career Development Across Teams and Subsidiaries

All open roles across the Catella APAM Group are shared internally via our WorkWell newsletter and online careers portal, and we take any opportunity to further develop our team.

Get in touch with HR for more information on transfers and secondments to different parts of the business.

Winning Together: Catella Group

Click to watch about the latest Catella Academy video

We are a part of the Catella Group, a pan-European network operating in 12 countries and 25 offices. Catella has crafted its own set values which we embody in everything that we do:

Winning Together **Entrepreneurial Spirit**

Value Creation **Empowerment**

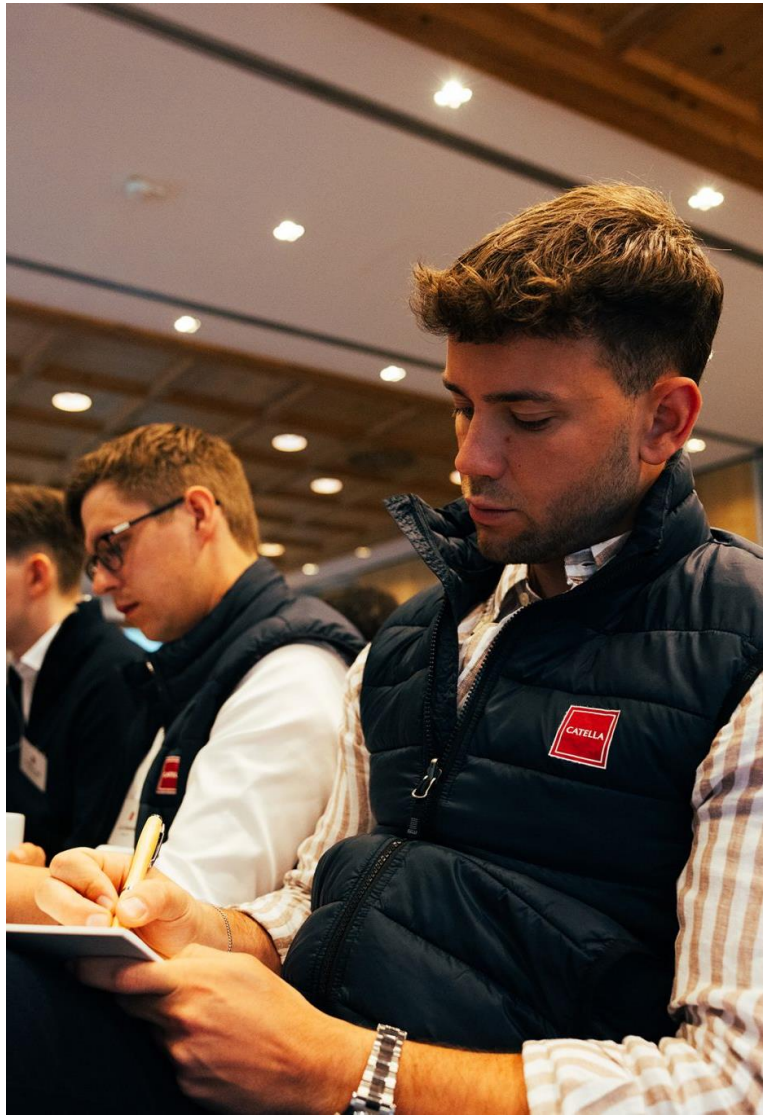
Future-focused

The guiding principles from Catella mean we have a shared sense of purpose and the understanding that together we are OneTeam.

Catella Academy

Catella are committed to your development and offer an annual Catella Academy which is hosted in a different European location across 3 – 4 days.

The Academy is open to all employees no matter seniority or position and offers an opportunity for a deeper understanding of the Catella Group Strategy.



Flexible Benefits Allowance

We understand that one size does not fit all, and we each have different needs and preferences. We have created a flexible benefits allowance empowering you to choose benefits that matter most to you and giving you more control over your compensation package.

The benefit allowance is available to all staff following the completion of your probation. The allowance value ranges from £1k to £3k pa dependent on your grade and is renewed every calendar year. We have a benefits summary booklet and policies available to you to help you make informed decisions.

You can use your allowance towards a combination of the below benefits based on what best suits you.

- **Top up your Pension**
- **Buy / Sell Annual Leave**
- **Cycle to Work Scheme**
- **Travel loans and Teambuilding Trips**

Or add an amount to your salary to use on what matters to you

Personalise Your Pension

Salary Exchange

Our salary sacrifice scheme allows you to exchange part of your salary for additional pension contributions. The exchange means you save on tax and national insurance.

Flexible Benefits Allowance Top up

You can allocate a portion of your flexible benefit allowance to increase your Employer Pension Contributions and minimise your Employee Contribution should you choose to.

If eligible and following three months' service, you will be automatically enrolled into our pension scheme and have the choice to opt out, if you so wish.

Under government rules, you will also be required to make personal contributions if you remain opted-in to the pension scheme. Both you as well as Catella APAM will continue to pay contributions every pay period, and the government will also continue through tax relief.

3%	4%	1%
employer	**employee**	**tax relief**

The Department for Work and Pensions annual earning threshold applies

Holiday Loyalty Scheme

We reward commitment and loyalty. Following two years' service, you will gain an additional day per year up to a maximum of 30 days annual leave per annum.

25

Basic Entitlement

The holiday year runs from 1st January until 31st December. Every employee is entitled to 25 days per annum. Entitlement is prorated for part-time employees and new joiners.

30

Accruing Holiday

You will receive your extra days at the beginning of the holiday year following the year in which your qualifying service falls. You can also carry forward up to 5 days of annual leave from the previous year.

+

Buy and Sell Annual Leave

You can purchase or sell a portion of your existing annual leave entitlement at two designated application periods throughout the year. You can buy up to a maximum of 30 days or sell down to a minimum of 23 days.

Additional Day for the Holiday Season

Every Christmas period you will be gifted an additional days leave. The day will be confirmed each year and blocked out automatically on our ADP Self Service Portal.

A Helping Hand To Go Places

Season Ticket Loan

We offer an interest-free loan to enable you to buy a season ticket for your yearly travel. The loan is deducted from your monthly net salary in instalments. Purchasing a season ticket allows you to make savings.

Cycle to Work Scheme

Cycling to work is good for you, for the environment and your pocket. Once signed up, you choose a new bike and cycle safety accessories worth up to £1,000 and Catella APAM buys it for you. The loan is paid back by way of a 'salary exchange' between you and Catella APAM. Savings are made because you are reducing your gross pay. This, in turn, reduces the amount of Income Tax and NI that you pay each month. In other words, this scheme enables you to get the new bike you need now whilst spreading the cost and making savings!

Travel Loans

We provide interest free-loans to support you participating in our team building trips abroad. The loans repayment will be taken from your monthly salary as per a pre-agreed repayment schedule.

Register

Please contact HR if you would like to register your interest in these schemes.

You can allocate your flexible benefit allowance towards any of these schemes.

Help When You Need It Most

When you need that time to get better, we don't want you to have to worry.

Group Income Protection

This benefit ensures you are provided with 50% of your salary if you are unable to work following 13 weeks of absence.

You will automatically be enrolled following 3 months service. The scheme is outside of the P11D regime so you will not incur any additional taxation (this also applies to death in service).

Death In Service

When someone dies suddenly, their family faces a dramatic drop in income at a time of great stress. This cover pays out a lump sum to your dependants should you die whilst in Catella APAM's employment.

The scheme will cover you for three times your gross salary until you are 65.

Sick Pay

Illness is inevitable from time to time, and it is not in the best interests for you or for Catella APAM to come to work whilst ill or to return before you are ready.

We have a discretionary sick pay scheme in place, which supports not only coughs and colds, but the long-term sicknesses that can occur.

Paid Leave

We understand that you may require leave beyond sickness-related absences.

We have a discretionary paid leave scheme of up to 20 calendar days per year that encompasses a variety of types of leave including sickness, dependants and carers leave

We want to ensure you have the flexibility and options available to you when you need it most.

Your Wellbeing

Providing you with a healthy working environment is vital to our well-being strategy from both a mental and physical health perspective. In addition to the flexible benefit allowance, we also offer other well-being initiatives to all staff through the HR team.

Full details of how to apply for these are detailed in our expenses policy and on our intranet.

Smart Health

This benefit offers a suite of six services; from on-demand consultations with UK based GPs to a nutrition consultation service.

All services are available to you and your immediate family, including your partner and any children up to the age of 21.

Annual Flu Jab

You will be contacted during flu season to ask whether you would like a voucher from Catella APAM.

Biennial Eye Tests

UNUM Help@Hand Portal

This external service provides a range of health and well-being services to you and eligible family members which includes a confidential 24/7 helpline, mental health support, remote GP appointments & more!

Ensuring Opportunities Are Open To All

Our culture is focused on wellbeing, diversity and inclusion and we want to ensure everyone has equal opportunities regardless of their personal circumstances. We have an employee led Diversity, Equality and Inclusivity Committee that is dedicated to making positive changes and improvements across all areas of our business.

Paternity leave and pay

You will receive 4 weeks paternity leave which is paid in full. We provide flexibility in how you would like to take your time off as long as plans are discussed and agreed with your line manager. We offer Additional Paternity Leave for long serving employees.

Sponsorship license

We understand that our diversity is our strength and have a sponsorship licence to enable us to issue a certificate of sponsorship should you require it. Sponsorship is provided on a one-year basis offering flexibility in accommodating potential changes to your role over time

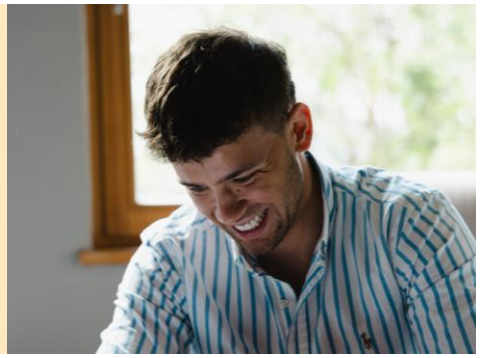
Our HR team have experience in the visa sponsorship process and can support you through your application process. In addition we offer a loan to cover employee-borne costs associated with the sponsorship process.

Maternity leave and pay

All employees are entitled to 52 weeks maternity leave. Following one year's service we offer an enhanced maternity leave payment programme. You receive your normal basic pay during the first 6 weeks', followed by half basic pay for the subsequent 20 weeks' maternity leave. For the following 13 weeks of your maternity period, you will be paid at the Statutory Maternity Pay rate.

For long serving employees, we offer Progressive Maternity Pay with further enhancements.

We support working parents at every stage and have a parents and carers working group as part of our DEI group. As well as enhanced paternity and maternity leave policies, our people benefit from both a phased return to work programme and flexible working policy.



Reward And Recognition Scheme

Discretionary Bonus

All members of staff participate in our discretionary bonus scheme. It is an important and significant part of your employment package. The bonus pot is directly linked to the success of the business with 15% of the Catella APAM Group's profits allocated to the staff each year. Therefore, all staff are incentivised to add value, contribute to the growth of the Catella APAM Group's performance and be conscious of cost control.

Share Scheme

We ran our first shareholding incentive scheme for eligible members from 2015-2018. The scheme vested at the time of Catella's acquisition and was very successful for those staff involved. Our 2021-2025 scheme was open for those who had at least 12 months' service and are higher preforming in any role or level across the business. Eligible members were invited to the scheme at the discretion of the Catella APAM board and at no cost to the employee. Please refer to our scheme booklet for further detail.

We believe in sharing Catella APAM's success with everyone who contributes to our performance.

We align team members with the long term sustainable and successful growth of the business.

Our schemes are dependent on your performance as well as the company as a whole, so the harder we all work, the greater the rewards.

This creates a strong team culture and a consciousness that everything you contribute has an impact on others. We work together to drive impact, grow the business and celebrate individual and team success.

Inclusive Team Culture

Our culture is defined by our working style and inclusive environment. We work in agile mandate delivery teams. This creates an environment of collaboration and promotes the contribution of each function and individual. This is supported by our open plan office and unrestrictive job descriptions.

We empower our people through a diverse range of employee led initiatives. These programmes present an opportunity to develop new skills, broaden professional and social networks and get involved with projects you are passionate about.

3
offices

70
employees

50%
women

SpeakUp Scheme

You will be empowered to SpeakUp for what is right and challenge the status quo. We provide informal and formal channels for you to raise issues or concerns. This allows us to continually improve and be held accountable.

Employee Engagement Programme

Provides an opportunity to connect and collaborate outside your immediate team.

You will be assigned an engagement group on your first day at Catella APAM. In this group you will take part in team building and training sessions throughout your time here.

Flexible Working

The office plays a vital role in our culture, training, creativity and innovation. We hope to create a working environment in each of our offices that promotes positivity and collaboration. However, we also value and recognise the advantages of working from home to ensure a comfortable work / life balance for our employees. We offer the option to work remotely for one day per week.

We understand that you may need further flexibility for a variety of reasons so you and your line manager can agree ad hoc working from home and flex-time arrangements considering your work commitments, needs of the business and your personal requirements.

Work From Anywhere

In addition to your annual leave and flexible working, we also offer up to 1 week (5 working days) per year for eligible employees to work from anywhere.

This may add some greater flexibility when scheduling holidays or managing commitments to friends and family.

This is open to all employees who have completed 12 months service and with line manager approval.

“WorkWell”

Our culture is defined by our working style and inclusive environment. We work in agile mandate delivery teams. This creates an environment of collaboration and promotes the contribution of each function and individual. This is supported by our open plan office and unrestrictive job descriptions.

We empower our people through a diverse range of employee led initiatives. These programmes present an opportunity to develop new skills, broaden professional and social networks and get involved with projects you are passionate about.

Team Collaboration

Celebrate Achievements

Support Programmes

Monthly Newsletters

Mental Health Space

We have a dedicated space on our intranet that gives you the full details of our support programmes and WorkWell Initiatives.

We run a quarterly tea and talk initiative that provides a safe for employees to connect and discuss mental health.

Town Hall Scheme

We run a quarterly Town Hall to encourage conversation and communication across all levels and teams of our business.

It is an opportunity to share ideas, align our company values and have an open discussion on what matters to you.

Helping You To Create Your Career

Our Skills Enhancement and Employee Development (SEED) programme ensures that every employee has a personal career pathway

Development Planning
Dedicated support and formal bi-annual meetings to set long-term career goals.

Value Creation
Understanding the importance of your work within the context of our strategy.

Support Networks
Access to a career coach, mentorship, engagement group and peers.

Build your own pathway
Access to opportunities across the Catella APAM and Catella Pan-European network.

Training And Development

We run detailed personalised induction programmes for every new starter but learning and development doesn't stop there. Firmwide and team specific training initiatives are rolled out quarterly. Our training programmes encourage you to engage with our values and positively contribute to our strategy. We want to support you to overcome barriers to effective performance.

We have a number of programmes and initiatives that bolster and complement our annual mandatory and technical training:

Personalised Induction
Featuring everything from strategy discussions to technical training.

Presentation Skills
A safe space to practise. Helping you to build confidence with a personalised tips and guidance report.

Leadership Programme
LEAD (Lead, Exceed, Achieve and Develop) helps you to discover and understand your leadership strengths.

Online Training Portal
Access to IT, accounting, soft skills and Microsoft Office courses online.

Study Support

We financially support employees completing professional qualifications and help them prepare with study and exam leave.

You can make personal study support and training requests via our Study Support policy.

Support Team
You'll benefit from our knowledge, tools and a strong support network including your career coach, buddies and qualification champions.

Victoria Morgan

Lateef Okanlawon

Qualification Champions
Get in touch with Lateef Okanlawon and Ben Kennedy who forms part of our Professional Qualifications Support team for more information.

Ben Kennedy

Subscriptions
We will subsidise professional membership subscriptions relevant to your role and development within the business.

Taking Time To Help Others

Our charity programme forms a crucial part of staff development and encourages all employees to participate in a wide range of fundraising events. We want you to feel proud and engaged to be a part of our 'Beyond Numbers' programme and we understand the effect this has on your development.

The charitable giving programme provides opportunities that are meaningful, purposeful and help those in need.

Please contact the Charity Committee for details of our charitable partners and initiatives.

Paid to volunteer
All employees can take 2 days paid leave to volunteer each calendar year.

Matched Giving
We match your personal fundraising to a maximum of £200 within our limit of £2,000 pa.

Team Events

We ensure we play as hard as we work. We host several firmwide events throughout the year including charitable volunteering in Zambia, a ski trip and summer and Christmas parties. We also provide loans for work trips abroad and subsidise nights out for you and your team.

We also host regular Friday Fridges in the office to celebrate the start of the weekend. There is also a bimonthly book club to connect with your teammates.

Help Us Grow

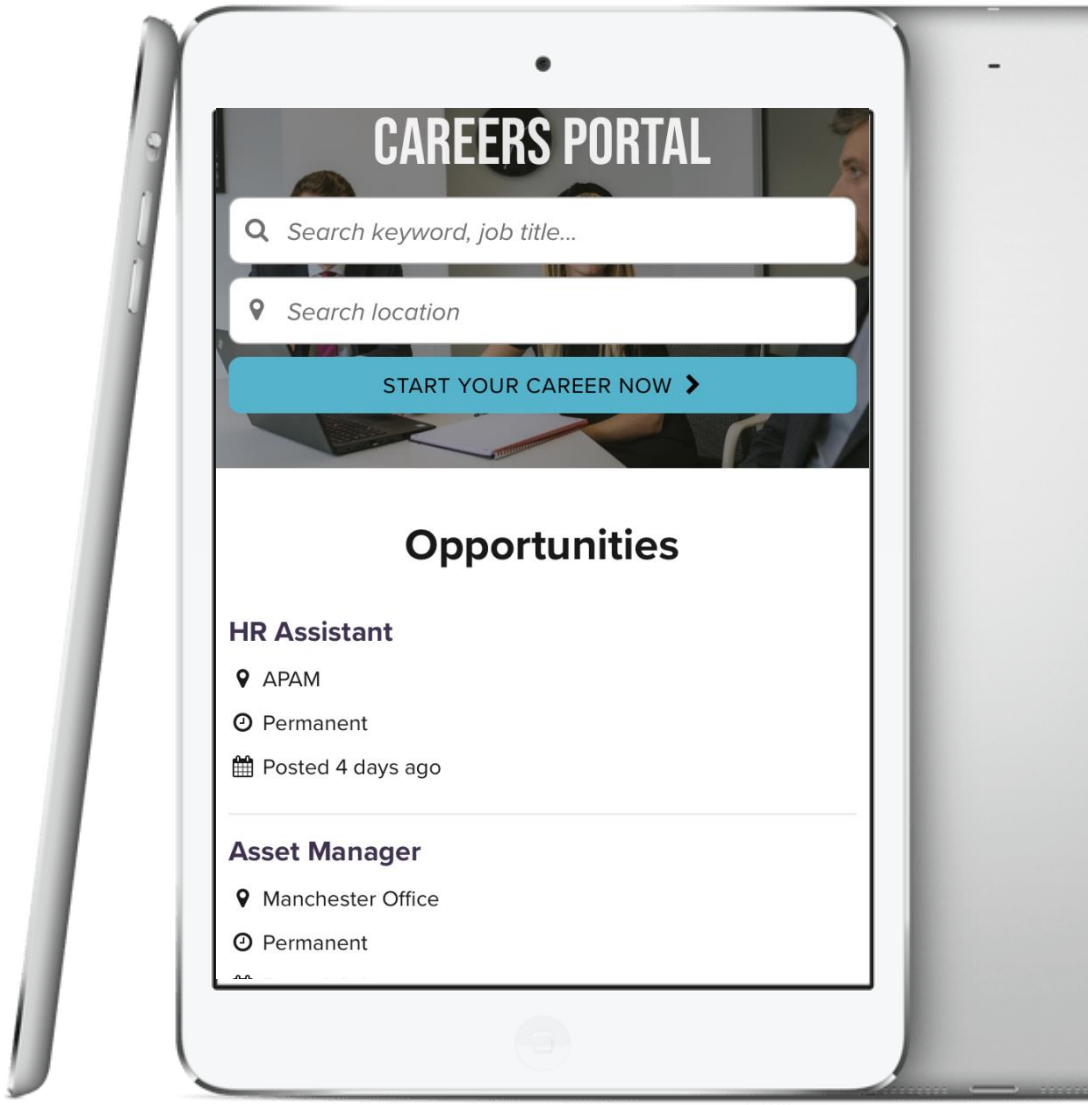
We understand that personal networks provide the opportunity to attract talented individuals to the team.

The organisation will pay you a £500 bonus when you successfully refer candidates to the team, provided that all the terms of this policy are satisfied.

The bonus will be paid in two 50% instalments: one on successful completion of the new employee's probation period and one when the new employee has completed 6 months' continuous service. You can also request for all or part of the bonus to be donated to a charity of your choice.

All opportunities can be found in our WorkWell newsletter or the online careers portal.

£500
Referral bonus



Our People Team

Our People Team has valuable and varied experience to ensure we are well equipped to support all your HR needs.

Please send all HR related queries to hr@apamuk.com and your request will be forwarded to the most appropriate team member.

HR: hr@apamuk.com

Payroll: payrollchanges@apamuk.com

Opportunities: recruitment@apamuk.com

Stay Connected

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