



Probert Financial Ltd

We, the undersigned, commit to honour the Armed Forces Covenant and support the Armed Forces Community. We recognise the value Serving Personnel, both Regular and Reservists, Veterans and military families contribute to our business and our country.

Signed on behalf of:

Probert Financial Ltd

Signed:

A handwritten signature in black ink, appearing to be "G. Probert", written over a horizontal line.

Name: Greg Probert

Position: Director

Date: 25/04/2022



The Armed Forces Covenant

An Enduring Covenant Between

The People of the United Kingdom
Her Majesty's Government

– and –

All those who serve or have served in the Armed Forces of the Crown

And their Families

The first duty of Government is the defence of the realm. Our Armed Forces fulfil that responsibility on behalf of the Government, sacrificing some civilian freedoms, facing danger and, sometimes, suffering serious injury or death as a result of their duty. Families also play a vital role in supporting the operational effectiveness of our Armed Forces. In return, the whole nation has a moral obligation to the members of the Naval Service, the Army and the Royal Air Force, together with their families. They deserve our respect and support, and fair treatment.

Those who serve in the Armed Forces, whether Regular or Reserve, those who have served in the past, and their families, should face no disadvantage compared to other citizens in the provision of public and commercial services. Special consideration is appropriate in some cases, especially for those who have given most such as the injured and the bereaved.

This obligation involves the whole of society: it includes voluntary and charitable bodies, private organisations, and the actions of individuals in supporting the Armed Forces. Recognising those who have performed military duty unites the country and demonstrates the value of their contribution. This has no greater expression than in upholding this Covenant.

Section 1: Principles of the Armed Forces Covenant

1.1 We **Probert Financial Ltd** will endeavour in our business dealings to uphold the key principles of the Armed Forces Covenant, which are:

- *no member of the Armed Forces Community should face disadvantage in the provision of public and commercial services compared to any other citizen*
- *In some circumstances special treatment may be appropriate especially for the injured or bereaved.*

Section 2: Demonstrating our Commitment

2.1 We recognise the value serving personnel, reservists, veterans and military families bring to our business and to our country. We will seek to uphold the principles of the Armed Forces Covenant, by:

- **Promoting the Armed Forces:**

Promoting our work, activities and events through our own digital and social media channels as well as working with the press

Publishing our Covenant pledges on a dedicated Covenant section/page on our website

Promoting the fact that we are an Armed Forces friendly organisation, to our staff, contractors, customers, suppliers and wider public

- **Veterans:**

Welcoming Applications from and guaranteeing interviews with, veterans who meet the criteria in the job specification

Recognising military skills and qualifications in our recruitment and selection process

- **Service Spouses & Partners:**

Supporting the employment of Service spouses and partners by welcoming applications from spouses/partners who meet the criteria in the job specifications

Partnering with and advertising vacancies on Forces Families Jobs and Recruit for Spouses, as well as advertising widely within the Armed Forces community

Endeavouring to offer a degree of flexibility in granting leave for services spouses and partners before, during and after a partner's deployment

- **Reserves:**

Supporting our employees who are already members of the Reserve Force

Staff are actively encouraged to become Reservists

Granting additional paid/unpaid leave for annual Reserve Forces training

Supporting any mobilisations and deployment

- **Cadet Organisations:**

Supporting our employees who are volunteer leaders in military cadet organisations

Granting additional leave to attend annual training camps and courses

Actively encouraging members of staff to become volunteer leaders in cadet organisations

Supporting local military cadet units

Recognising the benefits of employing cadets/ex-cadets within the workforce

- **National Events:**

Supporting Armed Forces Day, Reserves Day, the Poppy Appeal Day and Remembrance activities

- **Armed Forces Charities:**

Supporting Armed Forces charities with fundraising and supporting staff who volunteer to assist

- **Commercial Support:**

We at Probert Financial volunteer as part of the 'Forces MoneyPlan' which is a free pro bono initiative providing generic financial advice for service personnel and veterans.

This pro bono initiative was established by The Personal Finance Society to enable armed forces personnel and veterans, whether in receipt of related compensation payments or not, to benefit from free financial guidance from a fully qualified and regulated financial adviser and member of the Personal Finance Society. This may or may not lead to the delivery of fee-based regulated financial advice with a personal recommendation as to a course of action and/or product transaction.

The pro bono offering Armed forces personnel and veterans (regardless of health or injury) referred into this initiative will benefit from your expertise in respect of the following:

- 1. A pro bono guidance consultation with a financial adviser who is a member of the Personal Finance Society (minimum 45 minutes)*
- 2. The completion of a basic fact-find to help inform 3 below*
- 3. The receipt of an 'options and priorities' report (based on a standardised template)*
- 4. This report will provide information and guidance in respect of your finances, including some key considerations, priorities, sources of further information and, if required, how to access regulated financial advice in respect of a personal recommendation as to any course of action you might subsequently wish to take (i.e. 'what you should do next').*



2.2 We will publicise these commitments through our literature and/or on our website, setting out how we will seek to honour them and inviting feedback from the Service community and our customers on how we are doing.