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Liontrust signs up to Levelling Up Goals

Liontrust, a specialist fund management company, today announced its partnership with the Purpose Coalition on a Levelling Up Impact report which will set out its contribution to the levelling up agenda in the UK.

Liontrust aims to have a positive impact on its clients, stakeholders and society through its approach to investment management, helping clients achieve their financial goals, providing access to investments, supporting companies in generating sustainable growth, and empowering and inspiring the community.

The Levelling Up Impact report will highlight the work it is already undertaking to deliver a positive impact on wider society, particularly through financial education and sustainability within the framework of 14 Levelling Up Goals.

The Goals, established this year by former Education Secretary Rt Hon Justine Greening with input from businesses, universities and policymakers, are designed to provide an architecture that will help tackle the challenges the country faces post Covid-19. They focus on key life stages - from early years through to adulthood, alongside other barriers such as fair career progression and closing the digital divide - and highlight the main issues that need to be resolved to create a level playing field for everyone.

The Goals are the first major piece of work by the Purpose Coalition, which includes businesses, universities and public sector organisations, such as Amazon, bp, Gateley, Cisco, the BBC, UK Power Networks, University Hospitals Birmingham NHS Foundation Trust, University of York and many others.

John Ions, Chief Executive of Liontrust, said: "We are delighted to be supporting Levelling up Goals because of the importance of providing opportunities to as many people as possible wherever they grow up and live.

"One of the best ways of achieving this is through education. Helping children with numeracy and delivering financial education is very important to Liontrust because these are indispensable skills for everyday life. Research into financial literacy has shown a large number of young people in the UK do not feel confident about handling money and it is key to help children before they reach the age of 18.

"There is a responsibility to enable as many people as possible to boost their savings and future prosperity by making investments as simple to understand and as easy to access as possible. This is to democratise savings and investments.

"A way of encouraging people to engage with their savings to make them work more effectively is through sustainable investment. Most people can relate to the importance and benefit of sustainable investing for themselves and their world."

Justine Greening added: "Understanding finance and financial education is key to getting on in life. Being able to manage money can make a huge difference to how well a person can fulfil their potential.



As with other aspects of education, the earlier children can begin to develop those skills the more confident and proficient they become.

“As a successful fund management company, Liontrust is playing a vital role in providing expertise to raise financial awareness, providing effective financial education to some of those furthest away from a level playing field. It is also focused on delivering real social impact for its clients, colleagues and communities through its work on sustainability and to diversity and inclusion.

“Its partnership with the Newcastle United Foundation, for example, is delivering a numeracy programme, Financial Football, which engages primary school children by using real life scenarios and breaks down the barriers that some may have in understanding and learning about numeracy and finance.

“Liontrust has a committed approach to community engagement and is determined to ensure that it brings opportunities that will make a real difference, especially for young people in less privileged communities. With its Levelling Up Impact Report, it is demonstrating its willingness to go even further as part of a wider effort to level up the country and close the opportunity gap.”

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Notes to Editors

1. The 14 Levelling Up Goals have been established with input from businesses, universities, civil society and policymakers. They aim to set out clear objectives for the UK's Levelling Up challenge in the wake of Covid-19. Led by Rt Hon Justine Greening, they use the same framework as the UN Sustainable Development Goals, applied to the very different levelling up challenges facing the UK. A set of measures and metrics are currently in development to benchmark performance on the agenda. For more information see <https://www.levellingupgoals.org/>
2. For further information please contact Peter Bould at peter@thisispurpose.com



3. [Liontrust Asset Management](#), which was launched in 1995, is a specialist fund management group with shares quoted on the London Stock Exchange with a premium listing and is in the FTSE250 index. Liontrust has £36.5 billion in AuMA (as at 26 November 2021).