



FIRST NATIONS ENGAGEMENT STRATEGY

2022-2025



ShareSies

ACKNOWLEDGEMENT OF COUNTRY

Sharesies is proud to acknowledge the Gadigal people of the Eora Nation, the Traditional Owners of the land on which Sharesies is located.

We extend this acknowledgement to Elders; past and present, and those who have resided in the area and have been an integral part of the area's history.

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ABOUT OUR FIRST NATIONS STRATEGY

Sharesies Australia (Sharesies) is embarking on its very first, First Nations Strategy (The Strategy).

The Strategy will provide a structured approach and empower First Nations peoples and communities.

The team at Sharesies have worked in collaboration with Aboriginal consultancy, Ngurra Advisory to develop The Strategy and have identified realistic actions to help drive our contribution to reconciliation in the communities that we work in.

The Strategy is our commitment to embed cultural values and to work in partnership to support First Nations peoples and communities.



THE FUTURE WE GROW TOGETHER

© Amy Allerton

There are many layers to this story. You will see that our beautiful Country is at the forefront of the story (the land and the skies).

The story flows down from the top of the artwork, where the yellow has several meanings (the sun, strength and hope, life and light, and our ancestors' wisdom, guidance and knowledge) and connects all of us inclusively, touching every home (represented in the 'arches' at either side of the artwork).

The pineapple in the middle represents Sharesies and the pink semi-circle in the centre represents Sharesies' corporate journey of growth (represented by the layers of pink, made up of the many people, past and present, who work together and are united by the Sharesies mission).

The circle right in the middle of the artwork (below the main pineapple) is the seed planted by Sharesies which has flourished into a thriving network.

As the roots reach out they become a part of diverse communities, families and individuals all across the land, partnering and collaborating to create a ripple of growth for generations to come.

The roots continue to grow and reach out in search of new opportunities to collaborate and share, as the impact continues to grow and ripple out into the future.

MEET THE ARTIST

Amy Allerton is the founder and Director of Indigico Creative and a contemporary Aboriginal artist. Descended from the Gumbaynggirr and Bundjalung nations, she was born and raised on Gamilaroi Country in Tamworth NSW, where she is based with her husband and two children.

Amy has been providing graphic design services Australia-wide since 2014, collaborating with businesses and partnering with communities to creatively communicate the stories that bring us together. Amy is driven by her personal and professional vision that every story is given value and a voice, to revitalise communities, reconnect to culture and restore identities to build a stronger future.

A natural progression from designing visual communications in the corporate market, Amy applies her skills in digital illustration to deliver a modern approach to Aboriginal storytelling. Amy's artworks are an extension from her journey of exploring her own cultural identity, bringing her unique ability to speak in colour and imagery to create visual representations of the journeys and values of organisations and communities.

Amy uses structure, pattern and symmetry to create order out of chaotic emotional themes such as womanhood, motherhood, family, spirituality, purpose and connection, influenced by her own experiences of mental illness, chronic illness and generational trauma. Each artwork is hand-drawn on her iPad Pro with the Apple Pencil 2, resulting in a 'vector' image that has unlimited size scalability.



STATEMENT FROM SHARESIES

Sharesies has always been about removing barriers to anyone becoming an investor and to create financial empowerment for everyone.

But we recognise that for some people in our community, particularly First Nations people, that can be harder than others. This is why we are fully committed to engaging with First Nations people to work together on how we can remove barriers to investing.

Underlying our purpose are the impacts which we want to have, these are:

- Leading the way to equal opportunities;
- Supporting strong communities and partnerships;
- Creating a supportive and high-performing culture and workplace;
- Building a sustainable financial technology business;
- Building confident and motivated investors; and
- Protecting our natural environment that contains and surrounds us.

As we build out our business in Australia we believe that we should take purposeful steps to bring our purpose and impacts to life. Our First Nations Strategy is the start of our journey to build trust and relationships with community as well as finding a way to restore economic prosperity to First Nations people and communities.

The implementation of The Strategy is part of who we want to be as we grow and create our own Sharesies culture and also it is simply the right thing to do.

Our five areas of focus for The Strategy relate to:

- Financial Empowerment;
- First Nations Employment;
- Learning and Teaching;
- Culture; and
- Community

We will work with community to flesh out these concepts into actions that will result in real change.

We are committed to building the internal cultural capability of all our teams in Australia and New Zealand through ongoing cultural awareness training and immersion experiences.

The Strategy will be championed by the First Nations Strategy Working Group. It has also been endorsed by the Sharesies Board and Executive Team.

We cannot wait to start this important first step and build strong relationships as we begin to create a better today for Australia's First Peoples.

Sharesies.



EXECUTIVE SUMMARY

The Strategy is a statement of our commitment to build meaningful, mutually beneficial and sustainable relationships with First Nations people and communities.

It describes our engagement approach and vision to improve financial wellbeing and self-determination for Australia's First Nations people and communities as well as embed cultural values within the workplace. It focuses on strategic objectives in five areas of First Nations engagement including:

- Financial Empowerment;
- First Nations Employment;
- Learning and Teaching;
- Culture; and
- Community

The team at Sharesies has worked closely with First Nations people and consultants to ensure the approach to First Nations engagement is fit for purpose.

Sharesies aims to embed the strategic objectives contained within The Strategy as business-as-usual practices and is committed to ongoing transparent collaboration with First Nations peoples and communities to inform the suitability of products, services and customer experiences, ensuring that they are culturally appropriate and continue to meet the needs of First Nations people and communities.

Achieving the principles and actions contained within The Strategy will provide a foundation to collectively build inclusion and positive outcomes for First Nations people and communities by way of opportunity, knowledge and love.

The Strategy also acknowledges the importance of meaningful engagement that is intended to meet the needs of First Nations people and communities in a respectful manner.

An Implementation Plan has been developed to support and execute The Strategy, and to ensure Sharesies approach to First Nations engagement is consistently applied across the organisation.

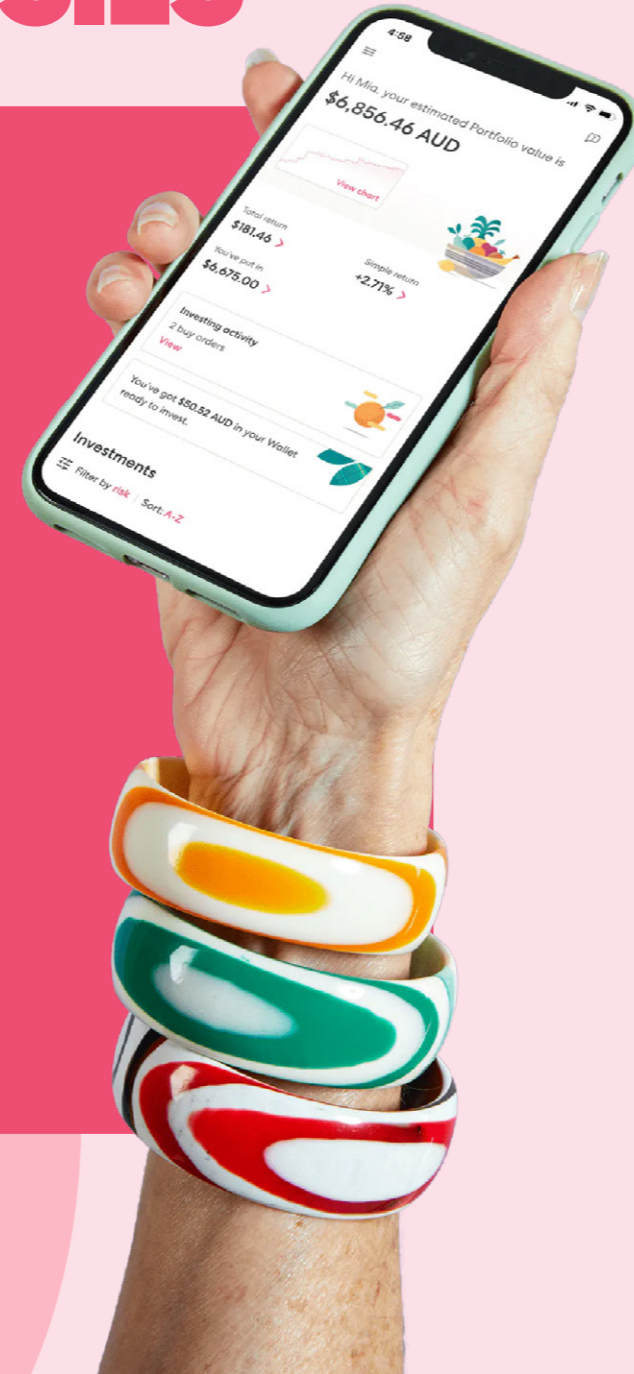
The approach will allow Sharesies to build strong collaborative partnerships with community and support Sharesies vision and commitment to creating wealth equality and opportunities for First Nations people and communities.

ABOUT SHARESIES

Sharesies platform exists to make investing easy and accessible. Before, investing was too hard, too complex, and too damned scary for too many. Deciding to build an accessible digital investment platform was a no-brainer.

The Sharesies investing experience works towards giving people the confidence and control to invest. We believe if we 'share the love' by giving someone the opportunity to invest, learn, and feel supported, then they'll be more likely to do the same for another person— creating a community of financially empowered people.

Now, over 600,000 people are using the Sharesies platform in Australia and New Zealand. We're continuing to break down the barriers to investing for more Australians, and create new ways to help people develop their wealth.



INTRODUCTION

The Sharesies First Nations Strategy 2022 – 2025 establishes how the organisation will position itself as a national leader in reconciliation and economic empowerment with First Nations people and communities.

Sharesies' purpose is to create the most financially empowered generation and to have an investor base that's representative of the wider population, enabling children through to the elderly to prosper and thrive.

In February 2021, Sharesies New Zealand embarked on its journey of corporate responsibility with the Māori people of New Zealand, creating a set of principles for Māori engagement to ensure that Sharesies is inclusive and respectful of Indigenous and minority groups. The Māori engagement principles are focused on four priority areas including:

- Recruitment
- Governance
- Wellbeing
- Product Development

Sharesies began operating in Australia in April 2021, and by August the team expressed a desire to develop a strategy for First Nations people and communities in Australia.

The Strategy has been developed in partnership with First Nations people with an aim to advance the aspirations and economic prosperity of First Nations people and communities, build First Nations engagement and improve cultural competency across the Sharesies team.

The strategic objectives and engagement approaches underpin Sharesies aspirations to improve wealth equality and self-determination for Australia's First Nations people and communities.

OUR JOURNEY SO FAR

Sharesies is committed to walking alongside First Nations peoples to learn, connect and create sustainable and meaningful opportunities in the communities in which we live and operate.

The following milestones outline our achievements to date:

Discovery Workshop
September 2021

Cultural Awareness Training
October 2021

Cultural Immersion Experience
December 2021

Community Consultation
February 2022

Commissioned Artwork
April 2022

Establishment of First Nations Working Group
July 2022

Board Endorsement and Strategy Launch
December 2022



THE FRAMEWORK

Purpose

The First Nations Strategy articulates a model for engagement, partnerships and empowerment between First Nations people, communities and Sharesies.

It provides Sharesies staff with the guidance and tools for First Nations engagement activities in the areas of financial empowerment, employment, education, community and culture.

Alignment

Having in place a meaningful way for First Nations engagement is core to our purpose to create financial empowerment for everyone and the impact which we want to have in the world which are:

- Leading the way to equal opportunities;
- Supporting strong communities and partnerships;
- Creating a supportive and high-performing culture and workplace;
- Building a sustainable financial technology business;
- Building confident and motivated investors; and
- Protecting our natural environment that contains and surrounds us.

FIRST NATIONS ENGAGEMENT STRATEGIC OBJECTIVES

Overview

The Sharesies First Nations Engagement Strategy aims to strengthen all engagement activities across Sharesies. The Strategy is driven by the following five core strategic objectives:

- Financial Empowerment
- First Nation Employment
- Learning & Teaching
- Community
- Culture

The Strategy objectives are closely aligned to the Sharesies service offering and are grounded by the experience and knowledge of our staff and most importantly the findings of community consultations undertaken with First Nations people.

Each objective is deliberate in its approach and is designed to serve and empower First Nations people and communities.

The team at Sharesies is deeply committed to the strategic objectives set out within this document and has worked in collaboration with First Nations consultancy, Ngurra Advisory to develop The Strategy.

STRATEGIC OBJECTIVE ONE: Financial Empowerment

Ensure that First Nations people and communities feel empowered to develop their wealth

Why is this strategic objective important: Sharesies believes in breaking down the barriers and giving First Nations people the confidence and control to invest and develop their wealth.

What we aim to achieve:

To strengthen the economic prosperity and self-determination of Aboriginal people and communities in Australia.

- We will explore opportunities to improve the accessibility of our products and services for First Nations people and communities
- Review and improve the client experience for First Nations people
- We will increase procurement opportunities for First Nations businesses

Key Measurements:

- Active engagement with First Nations communities
- Increased representation of First Nations clients
- Increased procurement of goods and services from First Nations businesses

STRATEGIC OBJECTIVE TWO:

First Nations Employment

Position Sharesies as a workplace of choice for First Nations people

Why is this strategic objective important: This pillar demonstrates Sharesies contribution to closing the gap on First Nations employment and commitment to creating opportunities for First Nations people.

What we aim to achieve:

Provide a work environment that attracts, retains and nurtures First Nations people and their careers.

- We support a culturally safe workplace to learn and support career aspirations
- Ensure all internal HR Policies are inclusive and supportive of First Nations people
- Investigate education and employment pathways for First Nations people
- We will improve the representation of First Nations staff

Key Measurements:

- Development of a Sharesies First Nations Employment Strategy
- Establishment of partnerships between First Nations education and employment providers
- Review of internal policies and procedures to ensure they are culturally appropriate and inclusive
- Increase in the number of First Nations students and employees undertaking cadetships, internships and senior executive roles
- 3% of all employees are First Nations people by 2025

STRATEGIC OBJECTIVE THREE:

Learning and Teaching

Provide education opportunities for First Nations people and communities to develop understanding and knowledge about investing

Why is this strategic objective important: Sharesies is committed to ensuring that First Nations people have access to culturally appropriate learning and educational materials

What we aim to achieve:

Create learning opportunities to improve the financial literacy of First Nations people and communities.

- We will work proactively to engage and deliver culturally appropriate financial education and materials to First Nations people and communities
- We will engage First Nations people to co-design educational materials
- We will champion the visibility of success stories of First Nations investors

Key Measurements:

- First Nations people have access to educational materials to help develop their understanding of financial wealth and investing
- Cultural adaption of learning and marketing collateral
- Sharesies will utilise its platform to promote and share success stories
- First Nations people feel empowered to make sound financial and investment decisions

STRATEGIC OBJECTIVE FOUR: Culture

Sharesies will build internal and external cultural visibility with First Nations communities and support the cultural capability and knowledge of staff

Why is this strategic objective important: Sharesies recognises the importance of First Nations culture, history and achievements.

What we aim to achieve:

To create a culturally safe environment for First Nations staff and communities and promote internal cultural awareness and competence.

- Build internal awareness of our First Nations Strategy
- Raise internal understanding of First Nations cultural protocols
- We will listen to and engage First Nations people and communities in a respectful and meaningful manner
- We will be respectful of sharing culture
- Staff will undertake First Nations cultural learning and immersion activities

Key Measurements:

- Communicate Sharesies First Nations Strategy commitments
- All staff to undertake Cultural Awareness Training
- Establish a First Nations Working Group
- Participate in and celebrate cultural dates of significance

STRATEGIC OBJECTIVE FIVE: Community

Sharesies will develop relationships with First Nations communities with a vision to empower First Nations people across Australia

Why is this strategic objective important: Sharesies is dedicated to building strong, mutually beneficial relationships that create opportunities and empower First Nations people, communities and staff.

What we aim to achieve:

Develop relationships with First Nations communities and likeminded organisations to support and advance The Strategy.

- Establish relationships and connect with First Nations communities across Australia
- Involve First Nations people in decision-making processes that impact community
- Support social and economic prosperity for First Nations people and communities
- Provide opportunities for staff to engage with and participate in external cultural activities with First Nations communities

Key Measurements:

- Establish relationships with First Nations communities
- Increased participation in community engagement activities
- All staff have the opportunity to engage with, and learn from, First Nations people and communities
- Sharesies is known as an organisation that fosters long term relationships with First Nations communities

IMPLEMENTATION PLAN

The Implementation Plan (The Plan) aims to progress The Strategy and actions, whilst also ensuring that Sharesies staff are equipped to execute The Strategy.

The Plan is a step-by-step guide which outlines a series of strategic objectives, action items, assigned owners, stakeholders, and due dates, and will help to assist the Sharesies team to achieve success.

A number of action items have been developed under each of the five strategic objectives and share a common goal of creating meaningful, impactful and sustainable relationships with First Nations people and communities.

MONITORING AND PERFORMANCE REPORTING

Monitoring and Performance Reporting will be a critical feature of The Strategy to ensure that outcomes can be tracked and measured.

Sharesies staff will be responsible for undertaking quarterly reporting to track and monitor The Strategy progress.

Quarterly reports will be submitted to the First Nations Strategy Working Group and the Executive Leadership team who are responsible for overseeing and supporting the implementation and progress of The Strategy outcomes.

In addition to the quarterly reports, an annual progress report will be put together outlining the progress, achievements and highlights made over the last 12 months under The Strategy. A copy of the annual progress report will be published on the Sharesies website.

REVIEWING AND EVALUATING THE STRATEGY

Reviews and evaluations are a central component of performance monitoring for the First Nations Strategy as they provide critical reflections on whether The Strategy and Implementation Plan approach are delivering the outcomes as intended and to help inform ongoing and future strategic activities.

It is recommended that evaluation activities must address the following key questions:

- Are we accurately measuring whether The Strategy is achieving what it has set out to do?
- Is progress being made against the Implementation Plan and The Strategy more broadly?
- What could Sharesies be doing better and how?

By addressing these questions, Sharesies will gain a deeper understanding of what has been working well with engagement activities and how Sharesies can ensure The Strategy is having maximum impact on the lives of First Nations people and communities.

In order to carry out the evaluation, staff will be required to input data relating to The Strategy outcomes into the performance monitoring spreadsheet on a quarterly basis.

The data will be uploaded and further evaluated by way of an annual report.

The annual report will focus on the progress of the strategic objectives and actions whilst also acknowledging the strong support of The Strategy from Sharesies staff.

Evaluations will be undertaken annually with the first review commencing in December 2023.

THANKS FOR SHARING

Sharesies would like to take this opportunity to express our appreciation to the following people. Without your support and contributions, the First Nations Strategy would not have been possible.

First Nations Survey Respondents

Survey respondents across the following Tribal Nations:

- Biripi
- Bundjalung
- Dharug
- Gurindji
- Muruwarri
- Wiradjuri
- Yuin

First Nations Businesses

Flic Ryan | *Big River Connections*

Amy Barnes | *Ngurra Advisory*

Matthew Atkins | *Plate Events and Catering*

Amy Allerton | *Indigico Creative*

Sharesies Staff

Brendan Doggett
Country Manager, Sharesies Australia

Cath Jones
PX Advisor

Melissa Shrestha
Social Media Executive



Sharesies