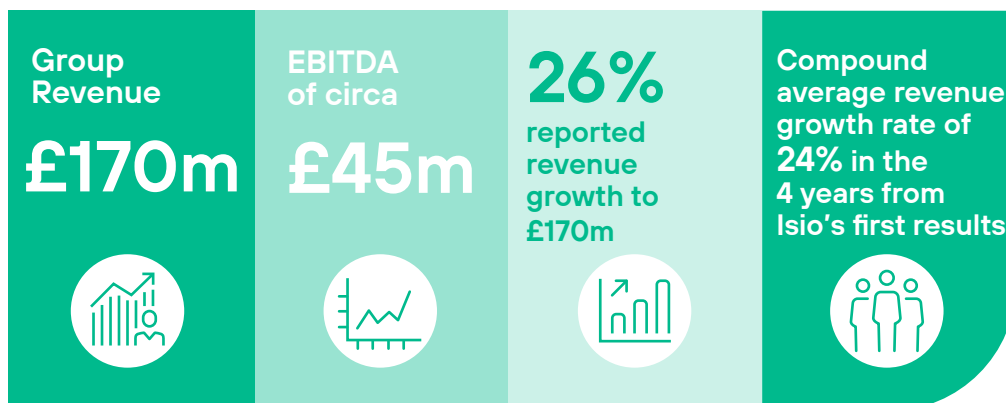


# Annual Results FY 2024.

**isio.**  
born to be better.

## Our financial year 2024



We are five years into a strong growth journey.

Launching on the eve of the pandemic we had to learn to adapt fast and I'm pleased to say we met that challenge and every challenge since.

We have always been determined to do things differently and that approach has yielded great success, of which these results are just the latest evidence. As we grow, we continue to diversify, serving new clients and markets. I would like to thank all Isio colleagues and clients for joining us on our growth journey and look forward to working closely with Aquiline to build on this success for the future.

**Andrew Coles, CEO, Isio**

## New investor Aquiline

In 2024, we secured new investment from Aquiline Capital Partners LP. We now move forward with Aquiline as our new partner at our side. Aquiline have deep experience in the global retirement and wealth management services sectors, they will support Isio to continue our ambitious growth trajectory with a focus on delivering value for clients through innovation.

## Challenger brand in the market









## Issues-led thought leadership

We kept our clients up-to-date through a programme of issues-led thought leadership focused on what matter most to them. Through 16 webinars, research-based reports, and over 40 in-person events we shared insight on Pensions Dashboards, Mansion House, Endgame solutions, Employee Benefits and investment market updates.

## Isio at PLSA Annual Conference



## Delivering better outcomes for our clients through diversified, innovative offerings

Actuarial & Consulting 	Pensions Administration 	Investment Advisory 	Employee Benefits 	Wealth Planning 	Private Capital 
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## Leading advisors on DB journey planning

We combine expertise and market-leading solutions to identify and support the optimum journey for our clients' DB schemes.

### Risk Settlement

We were the only advisor to transact with all 10 bulk annuity insurers, including the first deals of new entrants Royal London and Utmost.

### Reform to encourage run on

We've been at the heart of the regulatory debate, including pioneering our **Purposeful Run On** framework to safely share surpluses.

### DB Consolidation

80+

Schemes benefitting from lower costs and more efficient governance through our **Enplan** and **Master Plan** solutions.

## Digital services



3 new digital propositions  
3 major upgrades of existing solutions launched.

Developed the **Isio McCloud Remedy** tool for NHS and Police professionals whose tax arrangements are affected by the judgement.

## isio. Private Capital

Isio Private Capital leveraged corporate partnerships with Charity Finance Group and Campden Wealth across live events and thought leadership articles.

Doubled the number of family clients and assets under advice.

## reba partnership

Continued our partnership with the Reward & Employee Benefits Association, delivering topical thought leadership insight to senior HR leaders.

### i-FLO

Clients using i-FLO to facilitate the sale of illiquid assets.



STEWARDSHIP  
CODE

We remained signatories to the UK Stewardship Code, supporting and upholding best practice stewardship principles.

## Commitment to being better



£74.3K  
raised for MyBnk

2142  
volunteering hours



## Leading experts in our field

### Rising Star winner

**Sarban Hoonjan**  
Investment  
Manager  
of the Year



### Women in Pensions winner

**Cadi Thomas**  
ESG Woman of the Year



## Inclusion and belonging strategy

To reflect the deepened landscape of inclusion and belonging since Isio was founded in 2020, we have launched an updated strategy that represents a more systemic, long-term approach to inclusion and belonging.

## Launching our sustainability principles

Through our sustainability principles, we are engaging with our people, our clients to support them on their own journeys towards a more sustainable future. We are leading by example by committing to be net zero on our scope 1, 2 and 3 emissions by 2045 or sooner.

Living  
Pensions  
accreditation



## Investment in our people

five  
new partners



1,200+  
professionals

10 local  
offices

317  
new hires



128  
promotions



17%  
increase in  
early career  
hires

Read our full press release at [isio.com/annual-results](https://isio.com/annual-results)