



CEO Sustainability Statement

At VALEN in Switzerland, our purpose is to help families and their partners get ahead in life and in business. We're committed to making a positive difference economically, socially and environmentally, and focus on:

Empowering Families.

We wish to make it easier for families to organise their lives – anytime, anywhere – by giving them the information and tools they need to make smart, real-time decisions now, and for the future.

Helping our people to be their best.

We're dedicated to being a great place to work. We wish to create an environment where our people can challenge themselves, reach their potential, and contribute to the future of the VALEN philosophy.

Working with others to build a strong community.

We plan to partner with not-for-profits and social enterprises in our community that share our goals and values, and align with our approach to sustainability.

Our sustainability strategy as a purpose-driven business, sustainability will be integral to the way VALEN in Switzerland operates. This includes good governance; fair service; striving to be a top employer; and building a strong community in which we can all get ahead.

Being sustainable involves more than just reducing our own footprint; it also influences the choices we make – as a services-driven business. We also view sustainability as a source of competitive advantage. By integrating sustainability into our business strategy and operations, we are well placed to help facilitate a transition towards a fairer, greener economy by both contributing to families' efforts in this area, through the sustainable operations and technology we adopt, particularly "green data" processing, and by supporting partners that contribute solutions to environmental and social challenges.

Our general business strategy, as well as our broader business ambitions, follow a “sustainability-considered” model to include social, ethical and environmental criteria.

We implement the Equator Principles in our internal environmental and social policies, procedures and standards and they are embedded in our Environmental and Social Risk Framework.

Working with our stakeholders we seek to remain accountable to stakeholders across government and industry, as well as our people, our family licence users, our community and our business partners – and their expectations determine our priorities. Our family users can trust us to look after their interests, and be transparent and honest in the way we operate. VALEN in Switzerland will publicly champion the importance of organisational culture in ensuring the Family Office industry operates ethically and responsibly.

As a purpose driven organisation, we believe the onus is on us to consistently demonstrate behaviours in line with our principles and values.

Our values and behaviours underpin our culture and influence the way we do things: be honest, be prudent and be responsible.

John Sinclair – CEO & Founder

The VALEN Program