

Strategic Plan

FY 2025-2027



ABOUT US

Futurity Investment Group Limited (Futurity) is Australia's leading issuer of education bonds managing over \$1.0 billion in education-purposed investments on behalf of our 48,000 Members.


For 50 years Futurity has helped generations of Australians and New Zealanders achieve the education they want for themselves and their families by providing financial products that help save and plan for lifelong education costs.

Since our inception in 1974 (as Australian Scholarships Group), more than 570,000 children have received education benefits and \$3.8 billion has been paid to our Members and their education beneficiaries.

Futurity is an independent, mutual organisation and is privileged to manage the education-purposed investments of over 48,000 Members.

Operating across Australia and New Zealand, Futurity's products play an active role in supporting and shaping the education journeys of its Members and beneficiaries. Our operating footprint comprises five locations; our Melbourne head office, located on Wurundjeri land, as well as flexible satellite workspaces located in Sydney (Eora land), Brisbane (Meeanjin, Turbal and Yugambah lands), Adelaide (Kaurna land) and Perth (Whadjuk land).

We deliver impact through targeted philanthropy also via the Futurity Education Foundation, which was formed in 2021. For the past three decades we have celebrated and rewarded teaching excellence across all communities in Australia and New Zealand through the National Excellence in Teaching Awards.



We acknowledge the Traditional Custodians of the lands on which we work and live and recognise their continuing connection to land, water, and community. We pay our respects to Elders past and present.



FUTURITY
INVESTMENT GROUP



48,000
MEMBERS



570,000
MEMBERS

HAVE RECEIVED EDUCATION
BENEFITS SINCE 1974



\$3.8b

PAID TO MEMBERS
IN EDUCATION BENEFITS
SINCE 1974



\$1b

UNDER
MANAGEMENT



\$1.4m

INVESTED IN NEITA
SINCE 1994



Learn today, change tomorrow.

More than

\$710k

DONATED TO THE SMITH FAMILY
SINCE 2004



Educating Indigenous Children®

Committed to Yalari

\$300k

THREE YEAR GRANT
2024 - 2026

Executive **SUMMARY**

The past few years have been a time of significant change and transformation for the organisation. We have developed a plan to guide us through this next phase with a clear focus on increasing our impact.

Futura's three-year strategic plan will strengthen and grow our business sustainably and in line with our purpose. The foundation of our plan is the pursuit of impact by increasing access to education for more people and elevating teacher effectiveness.

This plan will establish stronger foundations on which more ambitious purpose-aligned growth will be delivered during and beyond the life of this plan.

Our people are pivotal in delivering value for Members and we will continue to foster a culture of excellence where our people are invested in and aligned to purpose.



Our Belief, Vision and Purpose **ARE OUTLINED BELOW**

Our Belief



We **BELIEVE** that education is a transformative force for good, with the power to create a more equitable society and a more innovative and prosperous world.

Our Vision and Purpose



Our **VISION** is that everyone has education and lifelong learning opportunities to fulfil their aspirations



Our **PURPOSE**

- Provide financial products that help Members save and plan for lifelong education costs;
- Advocate for quality education that is affordable, accessible and inclusive; and
- Enable education pathways for people experiencing disadvantage through philanthropy.

Our planning process has identified two strategic objectives; supported by six key pillars which we will focus on over the life of this plan.

Our Strategic OBJECTIVES

What we want to achieve

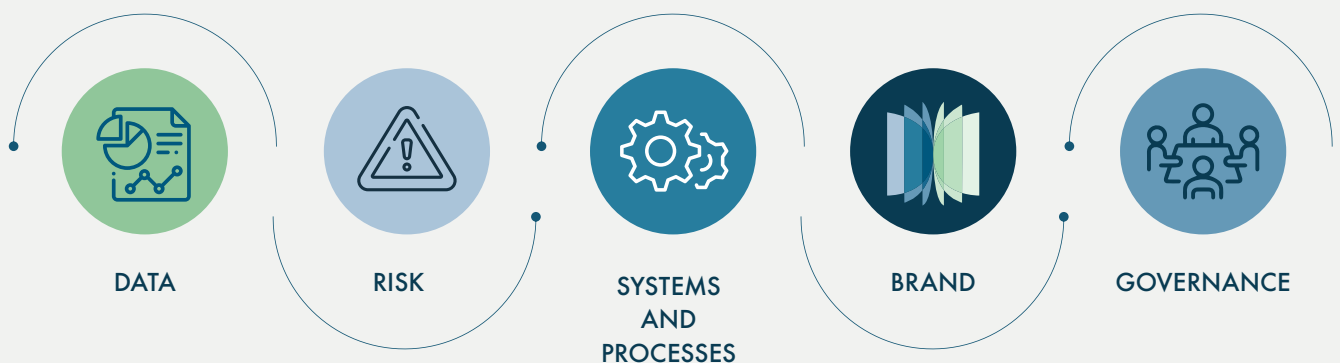
 <p>1. Financial Sustainability and Operational Maturity</p>	 <p>2. Extend our Reach and Impact</p>
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Our Strategic PILLARS

The things we will focus on

Our People and Members	Products and Services
Operating Efficiency and Risk Maturity	Advocacy, Philanthropy and Research
Sales / FUM growth	Partnerships and Networks

Supporting these pillars will be foundational work across five strategic enablers:



Our Planned **OUTCOMES**

There are eight high level outcomes we seek to achieve within the life of this plan:



High levels of Member engagement and satisfaction.



A high performing and risk aware workforce who feel connected, supported and aligned to purpose.



An operating model that is efficient with a mature risk culture.



We are sustainably profitable.



We achieve growth that is aligned with our Purpose.



We strengthen our leadership and influence.



Our social impact is measured and communicated.



We positively impact a greater number of people.

This strategy will be reviewed annually to ensure we are on track and responding to the needs of our Members and our operating environment.

We look forward to delivering on this plan and sharing our successes with you through our Annual Report.



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