



RECONCILIATION
ACTION PLAN

INNOVATE



E&P FINANCIAL GROUP

Innovate Reconciliation Action Plan

July 2024 – July 2026

EANDP.COM.AU



Gumbaynggirr women use ochre dots for dance, celebration and ceremony. My practice pays homage to this, expressing and continuing my family's connection to Country, Culture and Community. Our Nan's totem was fire, 'waagay' and the family must respect the power of fire.

The Country and practice depicted is not only culturally and ecologically significant, but significant to my story. This shapes the positive attitudes and resilience learnt from my wonderful mum and blended family. In particular, this yarn reminds me of my late Dad; waagay (his totem), his important stories and the memories of his time on Gumbaynggirr Wajaarr.

This is a gift of modern day storytelling that shares ancient public domain knowledge learnt from my Dad, my family, the community and cultural women sharing knowledge of the "Old Ways". I hope to share with my audience the depth and beauty of Country and the connection that I feel. A connection with the land, water, people and community.

Josie Rose - Gumbaynggirr artist

About the Artist

‘Waagay’ by Josie Rose



Josie Rose is a Gumbaynggirr artist from Coffs Harbour. Josie’s art features vibrant colours with intricate designs inspired by contemporary expressions of wajaarr (Country, including land and water) and guunuwaygam (life).

Waagay, meaning fire in Gumbaynggirr language, is an artwork designed and commissioned as part of the E&P

Financial Group’s 2024 Innovate Reconciliation Action Plan. The two original paintings are displayed at E&P’s Melbourne office.

The modern Aboriginal artwork is abstract and symbolic, capturing an ash covered earth, after an annual cultural cool, mosaic burn. Fire is an element capable of transforming and sustaining Country. Country holds language, kinship, lore, stories, songlines and ceremonial places. Country also embodies the strength of First Nations communities, providing resources for life and guiding First Nations Peoples’ ambitions for prosperity.

The painting also echoes the artist’s support of E&P’s commitment to the economic self-determination of First Nations Peoples, communities and organisations. The diptych, through prominent shapes, features expressions of respect, communication and intentional programs. These are key characteristics of E&P’s vision to partner with and service First Nations communities. Moreover, the detailing reflects the nuanced and culturally responsive needs of First Nations stakeholders and clients. While this conveys complexity, this is inherently vibrant.

E&P is on an exciting path to support First Nations prosperity and self-determination through respectful partnerships in the investment industry.

Acknowledgement

E&P Financial Group (E&P) acknowledges First Nations Peoples and the Traditional Custodians of the land and waterways upon which we work and depend. First Nations Australians proudly practise their laws, customs and languages and nurture lands, waterways and resources. With strength, pride and resilience, First Nations Australians' cultures continues to endure, grow and thrive today. E&P acknowledges this strength and diversity among First Nations Peoples.

We acknowledge and extend respect to the Traditional Custodians of the lands on which our offices operate. The Gadigal of the Eora Nation, the Wurundjeri and Boonwurrung people of the Kulin Nation, the Jagera people,

the Turrbal people, and the Ngunnawal people. We acknowledge each community's continuing culture and pay respect to their Elders past and present. We extend this respect to all Aboriginal and Torres Strait Islander Peoples, including our clients, partners and broader community.

We embrace the spirit of reconciliation and are committed to social, political, economic and cultural equity for First Nations Australians. We continue to work towards equality of outcomes and financial empowerment, noting the importance of the right and capacity to exercise self-determination as a key priority in these efforts.

Our Vision for Reconciliation

We envision a future where First Nations Australians exercise self-determination, aided by meaningful economic empowerment. A future where First Nations Australians enjoy and enrich our society as active investors and equitable recipients of capital. A future of shared prosperity, actively endorsed by a responsible and trusted financial services industry.

Creating opportunities for First Nations Peoples, organisations, and communities is a cornerstone of E&P's commitment to reconciliation.

This commitment spans our core business; including investments, equitable employment, inclusive procurement and targeted industry engagement. By actively fostering these opportunities, we not only contribute to the retention and growth of First Nations leaders, but also enable access to systems and processes that serve people and communities.



Leadership Statements

Reconciliation Australia



Karen Mundine

Chief Executive Officer
Reconciliation Australia

Reconciliation Australia commends E&P Financial Group on the formal endorsement of its inaugural Innovate Reconciliation Action Plan (RAP).

Commencing an Innovate RAP is a crucial and rewarding period in an organisation's reconciliation journey. It is a time to build strong foundations and relationships, ensuring sustainable, thoughtful, and impactful RAP outcomes into the future.

Since 2006, RAPs have provided a framework for organisations to leverage their structures and diverse spheres of influence to support the national reconciliation movement.

This Innovate RAP is both an opportunity and an invitation for E&P Financial Group to expand its understanding of its core strengths and deepen its relationship with its community, staff, and stakeholders.

By investigating and understanding the integral role it plays across its sphere of influence, E&P Financial Group will create dynamic reconciliation outcomes, supported by and aligned with its business objectives.

An Innovate RAP is the time to strengthen and develop the connections that form the lifeblood of all RAP commitments. The RAP program's framework of relationships, respect, and opportunities emphasises not only the importance of fostering consultation and collaboration with Aboriginal and Torres Strait Islander Peoples and communities, but also empowering and enabling staff to contribute to this process, as well.

With close to 3 million people now either working or studying in an organisation with a RAP, the program's potential for impact is greater than ever. E&P Financial Group is part of a strong network of more than 2,500 corporate, government, and not-for-profit organisations that have taken goodwill and intention, and transformed it into action.

Implementing an Innovate RAP signals E&P Financial Group's readiness to develop and strengthen relationships, engage staff and stakeholders in reconciliation, and pilot innovative strategies to ensure effective outcomes.

Getting these steps right will ensure the sustainability of future RAPs and reconciliation initiatives, and provide meaningful impact toward Australia's reconciliation journey.

Congratulations E&P Financial Group on your Innovate RAP and I look forward to following your ongoing reconciliation journey.

E&P Financial Group



David Evans

Non-Executive Chairman
E&P Financial Group

On behalf of the Board of Directors, I am pleased to present our inaugural Innovate Reconciliation Action Plan. This plan for reconciliation is a natural extension of our firm's heritage and principles. It represents an exciting new chapter that strengthens our partnerships with First Nations Peoples.

Our commitment to supporting the ambitions of First Nations communities echoes our longstanding purpose – to empower our clients to prosper. It is with this in mind that we seek to align our actions with the aspirations of First Nations communities. This includes building relationships based on trust, integrity and a collective commitment to growth and well-being.



Ben Keeble

CEO
E&P Financial Group

We are proud to unveil our 'Innovate' RAP for 2024, and are enthusiastic about the opportunities to collaborate closely with First Nations Australians. Building on important foundational programs and meaningful industry contributions to date, this document outlines our roadmap to foster greater trust, support innovation and enhance our First Nations-specific services.

As a participant in the financial services industry, we recognise that we must play an important role in supporting First Nations Peoples and communities—whether through managing investments, capital markets, or the provision of professional advice. Consequently, our RAP focuses on developing appropriate services that bolster a vibrant First Nations economic ecosystem.

However, our commitment extends beyond simply the services we provide. Our strategy encompasses employment and people development, cultural learning, and external engagement. We remain committed to cultivating talent, investing in our people, and nurturing robust community relationships. By embracing and engaging with diverse perspectives, we can better address the unique needs of our clients, shareholders, and the broader community.

As active participants in First Nations impact investment markets and strategic forums, we build upon strong foundations. Yet, we acknowledge the need to strengthen our ongoing efforts. Through this plan, we affirm our intent to collaborate closely with all our partners in advancing First Nations outcomes.

Our Business

E&P Financial Group is a financial services business with a history spanning more than 30 years. We provide quality, financial advice for private, institutional, and corporate clients across three business units.

**EVANS &
PARTNERS**



 Claremont Global

E&P Wealth

Provides a full-service solution for private clients through a complementary suite of wealth management services including strategic financial advice, investment advice, stockbroking, portfolio administration and reporting, self-managed superannuation fund administration and legal services.

E&P Capital

Provides stockbroking and investment advisory services to institutional clients and advice to corporations, including advice on equity and debt capital market transactions, public markets and private treaty mergers and acquisitions, corporate divestments, private equity buyouts, debt financing and corporate restructurings.

E&P Funds

A specialist global fund manager with a quality focus and high-conviction approach. Invests in some of the world's best businesses, following a disciplined and time-tested investment process.

As of 31 December 2023, E&P had 321 total employees across four offices in Australia: including Melbourne, Sydney, Canberra and Brisbane. We are proud to have a number of First Nations staff and clients. However, we are currently unaware of the exact First Nations representation within our community, as we are yet to establish appropriate and respectful monitoring systems.

At E&P we are focused on delivering long-term value to all our stakeholders. This includes our clients, our people, our shareholders and the broader community within which we operate. We recognise the importance of sustainability considerations, such as First Nations reconciliation, in meeting our business objectives and seek to ensure our operations and investment services are aligned accordingly.

As trusted advisors and active stewards of capital, our influence as an intermediary spans three notable groups:



Investments

How we allocate investment and financial capital to support First Nations Peoples.



Industry & Community

How we collaborate with industry and community to progress best practices and capacity building.



Internal Operations & Culture

How we promote ongoing cultural learning and actions within our network.



Our RAP Journey

Over the past 12-months, E&P has undergone a process of reflection on its relationships with First Nations communities. This process has led to the development of our 2024 'Innovate' RAP. To date, our focus on reconciliation has related primarily to our core business. E&P is currently an active participant in impact investment markets, First-Nations specific industry development dialogues and corporate philanthropy. We aim to expand on our engagement and programs, while also taking more purposeful actions regarding cultural safety and learning, First Nations employment and procurement outcomes.

Proud members and signatories

**PHILANTHROPY
AUSTRALIA**



Investments

Respect guides our client relationships and advice. This commitment extends to honouring the unique cultural and historical contexts of First Nations clients and stakeholders. We are dedicated to genuine engagement – understanding the needs and goals of each client, to provide innovative and responsive investment solutions.

E&P has built a specialist advisory capability for the Not-for-Profit (NFP) sector, featuring a dedicated team of experienced advisers. Our funds under advice in the NFP sector currently exceeds \$2.6 billion across over 100 organisations. NFP and for-purpose advice is an area of expertise among E&P's broader \$26 billion client network.

E&P also has a dedicated team to support integrating sustainable and impactful outcomes within investment mandates. This includes investments linked directly to First Nations outcomes, and many others that address intersectional issues relating to First Nations affairs. For example, E&P has engaged in detailed due diligence, provided financial advice and conducted investment research in areas such as First Nations venture capital, debt, carbon markets, biodiversity, water and other areas. We also have existing relationships with investment managers that seek to promote First Nations outcomes.

Industry & Community

E&P maintains a firm-wide community engagement program, designed to support local and national charities through volunteering, participating and donating. Through this program, E&P has held a long-standing relationship with Red Dust. Red Dust's mission is to enrich lives, improve health and strengthen the future of First Nations youth and families. They achieve this by delivering innovative health, well-being and reconciliation programs co-designed in partnership with remote communities. Through our RAP, we aim to continue supporting First Nations outcomes, and strengthen our engagement with further First Nations led organisations.

E&P has also been an active contributor to high-level collaborative efforts to progress First Nations outcomes within the broader financial market eco-system. This includes:

- Membership of the Responsible Investment Association of Australasia (RIAA) First Nations Working Group.
- Project leadership and interview contributions for RIAA First Nations investment markets research.
- Membership of the Philanthropy Australia First Nations Funders Network.



Caleb Adams, Associate Director of ESG & Sustainable Investment and proud Wulli Wulli man, presenting on First Nations investment markets at the 2024 RIAA Conference.

- Membership of the Australian Sustainable Finance Institute (ASFI) First Nations Reference Group, supporting the integration of First Nations rights considerations within Australia's Sustainable Finance Taxonomy and related disclosure framework.
- 'Expert' Participation in the 2023/4 UNPFII Expert Group Meeting (EGM) on Indigenous Peoples in a Green Economy, contributing recommendations to the Permanent Forum for consideration.
- Participation in the UNFCCC Local Communities and Indigenous Peoples Platform (LCIPP) Pacific regional gathering.

Internal Operations & Culture

Our reconciliation journey has also involved a process of initial reflection, leading to operational improvements. This includes initiatives such as:

- The introduction of a formal Cultural Flexibility Policy.
- The introduction of a formal Community Volunteering Leave Program.
- The review of our Diversity, Equity and Inclusion Policy.
- A firm-wide Diversity Working Group and initial strategy.
- Initial First Nations procurement actions for ongoing operations and the 2024 fit out of our Melbourne Office.



Aboriginal Investment Group and The Heart Foundation event, hosted at E&P's Melbourne office

Priority Initiatives

	Wealth	Funds	Capital
Investments	<p>Provide a platform for investments that promote First Nations outcomes, including those with indirect co-benefits.</p> <p>Develop bespoke service and education offering/s, tailored to First Nations clients, such as Prescribed Body Corporates, Registered Aboriginal Parties, Land Councils, Corporations and Foundations.</p>	<p>Maintain robust Environment, Social and Governance (ESG) and Engagement policies, including wholistic human rights considerations.</p>	<p>Explore relationships within the First Nations business sector to understand capital management needs.</p> <p>Expand investment research offering to include First Nations considerations.</p>
Industry & Community	<p>Provide open opportunities for investment education for First Nations community leaders, executives, directors and professionals.</p> <p>Maintain an advisory presence in high-level dialogues and industry initiatives.</p> <p>Explore impactful and mission-aligned volunteering and philanthropic opportunities.</p> <p>Explore community and service-provider partnerships for First Nations capacity building.</p>		
Internal Operations & Culture	<p>Review policies and procedures relating to diversity, equity, inclusion and anti-discrimination.</p> <p>Integrate cultural learning within our firm-wide learning, development and diversity strategies.</p> <p>Expand our internship and professional development programs, aiming to support First Nations financial services professionals within E&P and the broader industry.</p> <p>Design and deliver a First Nations procurement strategy.</p>		



RAP Working Group

To effectively and inclusively implement our 2024 Innovate RAP, a targeted RAP Working Group (RWG) has been formed. Participation from the broader firm will also occur for specific projects and passionate individuals.

The senior leadership team will provide strategic direction, ensuring adequate resources and promoting broader cultural alignment. People and Culture will lead employment strategies and training programs. Facilities and Procurement will lead supplier diversity and First Nations business engagement efforts. The Sustainable Investment team will lead engagement regarding First Nations capital markets. The marketing and business development team will promote RAP initiatives internally and externally, ensuring culturally appropriate and transparent reporting.

Ben Keeble CEO (Executive RAP Champion & Working Group Chair)

Tony Johnson Executive Director (Board RAP Champion)

Rose Clark Chief People Officer

Will Hart Director, ESG & Sustainable Investment

Caleb Adams (First Nations identified) Associate Director, ESG & Sustainable Investment

Kate Soumilas Executive Director, Commercial

Peter Jorgensen Managing Director, Co-Head of Private Wealth

Andrew Serle Executive Director, Corporate Advisory

Miriam Gilbert Head of Learning and Development

Olivia Gorton Director, Facilities and Procurement



Relationships

At E&P, we believe that building strong relationships between First Nations Peoples and other Australians is foundational to reconciliation outcomes. Such relationships foster a culture of connectivity, respect and shared experiences. For our 2024 RAP, we will focus on building strong cultural foundations, appropriate policies, and place-based relationships. These efforts will guide our future programs in collaboration with First Nations Peoples. These efforts are not just a corporate responsibility but also a strategic investment that strengthens our business and the communities we serve.

Action	Deliverable	Timeline	Responsibility
1. Establish and maintain mutually beneficial relationships with First Nations stakeholders and organisations.	Meet with local First Nations stakeholders and organisations to develop guiding principles for future engagement (both commercial and non-commercial).	Sep, 2024	AD, Sustainable Investment
	<p>Develop and implement an engagement plan to work with First Nations stakeholders and organisations. The engagement plan will establish overarching principles, next steps and timing relating to existing programs and ambitions such as:</p> <ul style="list-style-type: none"> · Our community engagement strategy, to further support staff volunteering and engagement with First Nations organisations and communities. · Our approach for structured corporate and staff donations to First Nations organisations and outcomes. · Opportunities to strengthen capacity building partnerships and engagement through our investment education events. 	Sep, 2024	Chief People Officer AD, Sustainable Investment
2. Build relationships through celebrating National Reconciliation Week (NRW).	Circulate Reconciliation Australia's NRW resources and reconciliation materials to our staff.	May 2025/6	ED, Marketing ED, Commercial
	RAP Working Group members to participate in an external NRW event.	27 May-3 Jun, 2025/6	RWG Chair
	Encourage and support staff and senior leaders to participate in at least one external event to recognise and celebrate NRW.	27 May-3 Jun, 2025/6	RWG Chair
	Organise at least one NRW event each year.	27 May-3 Jun, 2025/6	ED, Commercial ED, Marketing
	Register all our NRW events on Reconciliation Australia's NRW website .	May 2025/6	ED, Marketing

Action	Deliverable	Timeline	Responsibility
3. Promote reconciliation through our sphere of influence.	Develop and implement a staff engagement strategy to raise awareness of reconciliation across our workforce.	Dec 2024	Director, L&D ED, Marketing
	Develop a strategy to raise awareness of reconciliation across our client and industry network through visible aspects such as our office design and artwork.	Dec 2024	Director, Facilities and Procurement
	Communicate our commitment to reconciliation publicly.	Jul 2024	Director, Sustainable Investment ED, Marketing
	Explore opportunities to positively influence our external stakeholders to drive reconciliation outcomes.	Dec 2024	AD, Sustainable Investment ED, Marketing
	Collaborate with RAP organisations and other like-minded organisations to develop innovative approaches to advance reconciliation.	Dec 2025	AD Sustainable Investment
4. Promote positive race relations through anti-discrimination strategies.	Conduct a review of HR policies and procedures to identify existing anti-discrimination provisions, and future needs.	Sep 2024	Chief People Officer
	Engage with First Nations staff and/or First Nations advisors to consult on our anti-discrimination policy.	Dec 2024	Chief People Officer
	Develop, implement, and communicate an anti-discrimination policy for our organisation.	Mar 2025	Chief People Officer
	Educate senior leaders on the effects of racism.	Jun 2025	Director, L&D

Action	Deliverable	Timeline	Responsibility
5. Support ecosystem development through active participation in Industry dialogues relating to First Nations investment markets and impact.	Contribute to the RIAA First Nations Working Group and Technical Advisory Body dialogues.	From Jul 2024 Review Jul 2025	AD, Sustainable Investment
	Contribute to the ASFI First Nations Reference Group dialogues.	From Jul 2024 Review Jul 2025	AD, Sustainable Investment
	Contribute to the Philanthropy Australia First Nations Funders Network dialogues.	From Jul 2024 Review Jul 2025	AD, Sustainable Investment
6. Build First Nations economic opportunities through investment and wealth management education.	Consult with First Nations leaders to ensure investment education and engagement programs are culturally safe and structured in a meaningful way that they will reach, educate and support First Nations Peoples.	Sep 2024	Director, Sustainable Investment
	Actively promote investment education seminars and events to First Nations executives, directors, professionals and community leaders, providing education and networking opportunities.	Dec 2024	Director, Sustainable Investment
	Investigate programs and partners for capacity building in investments and wealth management.	Jun 2025	Director, Sustainable Investment



Respect

Respect for First Nations cultures, histories, knowledge, and rights is integral to E&P's reconciliation efforts. It is through ongoing learning, celebration and acknowledgement that we foster an environment of deep respect. Elevating opportunities to understand and respect the world's oldest living cultures brings a wealth of understanding and appreciation that enriches our corporate culture and reinforces our commitments. We understand that this is an important and ongoing process to enable future strong relationships with First Nations Peoples and communities.

Action	Deliverable	Timeline	Responsibility
7. Increase understanding, value and recognition of First Nations cultures, histories, knowledge and rights through cultural learning.	Conduct a review of cultural learning needs within our organisation.	Dec 2024	Director, L&D
	Consult local Traditional Owners and/or First Nations advisors to inform our cultural learning strategy.	Dec 2024	Director, L&D
	Develop, implement, and communicate a cultural learning strategy document for our staff.	Mar 2025	Director, L&D
	Provide opportunities for RAP Working Group members, HR managers and other key leadership staff to participate in formal and structured cultural learning.	Jul 2025	Director, L&D
8. Demonstrate respect to First Nations Peoples by observing cultural protocols.	Increase staff's understanding of the purpose and significance behind cultural protocols, including Acknowledgement of Country and Welcome to Country protocols.	Sep 2024	Director, L&D CEO
	Develop, implement and communicate a cultural protocol document, including protocols for Welcome to Country and Acknowledgement of Country.	Sep 2024	Director, Facilities and Procurement
	Invite a local Traditional Owner or Custodian to provide a Welcome to Country or other appropriate cultural protocol at significant events each year.	Jul 2025	ED, Commercial ED, Marketing
	Include an Acknowledgement of Country or other appropriate protocols at the commencement of important meetings.	Aug 2024	ED, Marketing CEO
9. Build respect for First Nations cultures and histories by celebrating NAIDOC Week.	RAP Working Group to participate in an external NAIDOC Week event.	First week in July, 2025/6	RWG Chair
	Review HR policies and procedures to remove barriers to staff participating in NAIDOC Week.	Aug 2024	Chief People Officer
	Promote and encourage participation in external NAIDOC events to all staff.	First week in July, 2025/6	CEO Chief People Officer



Opportunities

Creating opportunities for First Nations Peoples, organisations, and communities is a cornerstone of E&P's commitment to reconciliation. Our primary focus remains our core business; including impact investments, equitable employment, inclusive procurement and targeted industry engagement. By actively fostering these opportunities, we hope to promote a more accessible, representative and impactful financial service industry.

Action	Deliverable	Timeline	Responsibility
10. Improve employment outcomes by increasing First Nations recruitment, retention, and professional development.	Build understanding of current First Nations staffing and associated HR data management to inform future employment and professional development opportunities.	Dec 2024	Chief People Officer
	Engage with First Nations staff to consult on our recruitment, retention and professional development strategy.	Aug 2024	Chief People Officer
	Develop and implement a First Nations recruitment, retention and professional development strategy.	Jul 2025	Chief People Officer
	Deliver a pilot internship program with First Nations partner organisations such as CareerTrackers Indigenous Internship Program or Aurora Education Foundation.	Jul 2026	Chief People Officer
	Explore scholarship and professional development programs that E&P can establish or champion, to support a stronger First Nations 'talent pipeline' within the broader financial services industry.	Jul 2026	Chief People Officer
	Advertise job vacancies to effectively reach First Nations stakeholders.	Dec 2024	Chief People Officer
	Review HR and recruitment procedures and policies and take actions to remove barriers to First Nations participation in our workplace.	Sep 2024	Chief People Officer

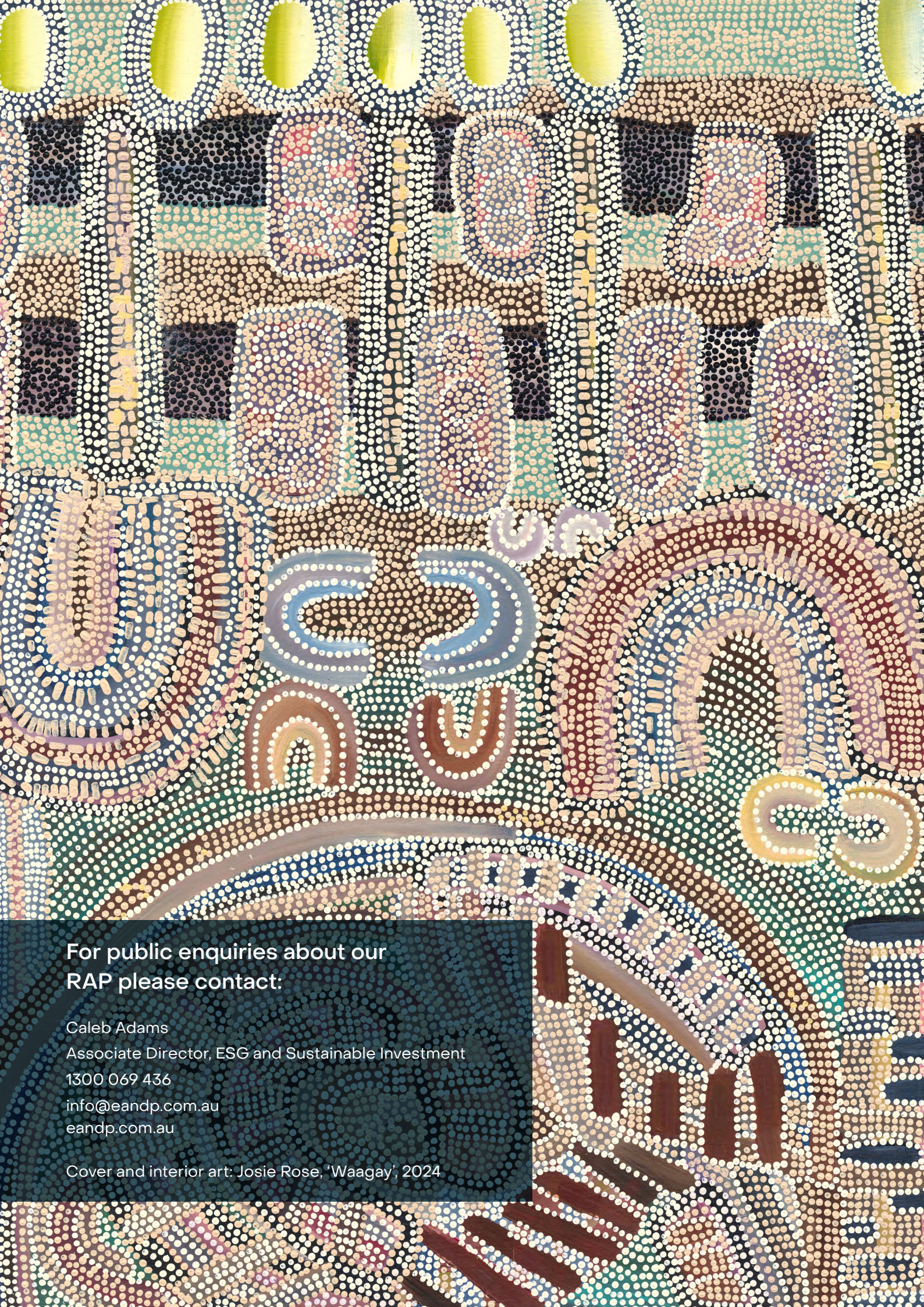
Action	Deliverable	Timeline	Responsibility
11. Increase First Nations supplier diversity to support improved economic and social outcomes.	Explore First Nations procurement opportunities for the Melbourne office fit out, documenting learnings and successes for internal evaluation.	Jul 2024	Director, Facilities and Procurement CEO
	Review, enhance and implement a First Nations procurement strategy.	Sep 2024	Director, Facilities and Procurement
	Investigate Supply Nation membership.	Sep 2024	Director, Facilities and Procurement
	Develop and communicate opportunities for procurement of goods and services from First Nations businesses to staff.	Dec 2024	Director, Facilities and Procurement ED, Marketing
	Review and update internal procurement practices to remove barriers to procuring goods and services from First Nations businesses, including but not limited to: <ul style="list-style-type: none"> · Review accessibility of supplier registration. · Review effectiveness of data management when onboarding suppliers. · Review alignment of tendering processes. 	Dec 2025	Director, Facilities and Procurement Chief Risk Officer
	Develop commercial relationships with Aboriginal and/or Torres Strait Islander businesses.	Aug 2024	Director, Facilities and Procurement
12. Establish a formal investment advice service offering specifically for First Nations clients.	Review existing specialist services, such as NFP offerings, to understand relevant strength and limitations.	Sep 2024	ED, Commercial
	Work collaboratively with First Nations community and industry partners to understand the unique needs of First Nations wealth management.	Dec 2024	Director, Sustainable Investment
	Explore partnerships with First Nations community wealth holders to evolve and enhance bespoke service offerings.	Jun 2025	ED, Commercial

Action	Deliverable	Timeline	Responsibility
13. Facilitate investment in First Nations investments.	Conduct a detailed review on existing and emergent First Nations investment opportunities, including direct and managed fund investment schemes.	Dec 2024	Director, Sustainable Investment
	Connect interested investors with suitable portfolio requirements to high-quality First Nations investment opportunities.	Jun 2025	Director, Sustainable Investment
	Host a seminar series for clients and our broader networks, featuring leading asset management experts relating to First Nations outcomes.	Jun 2025	Director, Sustainable Investment ED, Commercial
	Explore relationships within the First Nations business sector to support capital raising and liquidity events.	Dec 2025	ED, Corporate Advisory Director, Sustainable Investment
14. Promote a stronger focus on First Nations priorities and considerations in investment processes and research.	Publish a thematic ('Green Shoots') investment research publication on First Nations Investment markets.	Dec 2024	Director, Sustainable Investment
	Review investment stewardship and engagement practices and policies relating to First Nations rights and engagement within our internal and affiliated funds management strategies.	Jun 2025	Director, Sustainable Investment
	Explore the feasibility of elevating First Nations considerations within company specific research, by developing a formal understanding of considerations such as: <ul style="list-style-type: none"> · What First Nations risks, opportunities and expectations are material to financial performance and fiduciary responsibilities? · What are the First Nations and reconciliation related priorities of E&P Research's clients, such as superannuation funds and institutional investment managers? · What internal expertise, cultural learning and First Nations consultation is required to implement and scale meaningful client solutions? 	Dec 2025	Director, Sustainable Investment Head of Research



Governance

Action	Deliverable	Timeline	Responsibility
15. Establish and maintain an effective RAP Working Group (RWG) to drive governance of the RAP.	Maintain First Nations representation on the RWG.	Jul 2026	RWG Chair
	Establish and apply a Terms of Reference for the RWG.	Jul 2026	AD, Sustainable Investment
	Meet at least four times per year to drive and monitor RAP implementation.	Jul 2026	RWG Chair
16. Provide appropriate support for effective implementation of RAP commitments.	Define resource needs for RAP implementation.	Jul 2024	AD, Sustainable Investment
	Engage our senior leaders and other staff in the delivery of RAP commitments.	Jul 2026	CEO
	Define and maintain appropriate systems to track, measure and report on RAP commitments.	Jul 2026	RWG Chair
	Appoint and maintain an internal RAP Champion from senior management.	Jul 2024	CEO
17. Build accountability and transparency through reporting RAP achievements, challenges and learnings both internally and externally.	Contact Reconciliation Australia to verify that our primary and secondary contact details are up to date, to ensure we do not miss out on important RAP correspondence.	Jun Annually	RWG Chair
	Contact Reconciliation Australia to request our unique link, to access the online RAP Impact Survey.	Aug Annually	RWG Chair
	Complete and submit the annual RAP Impact Survey to Reconciliation Australia.	Sep Annually	RWG Chair
	Report RAP progress to all staff and senior leaders quarterly.	Quarterly, 2024, 2025, 2026	RWG Chair
	Publicly report our RAP achievements, challenges and learnings, annually.	Dec Annually	RWG Chair ED, Marketing
	Investigate participating in Reconciliation Australia's biennial Workplace RAP Barometer.	Apr 2026	RWG Chair
	Submit a traffic light report to Reconciliation Australia at the conclusion of this RAP.	July 2026	RWG Chair
18. Continue our reconciliation journey by developing our next RAP.	Register via Reconciliation Australia's website to begin developing our next RAP.	Jan 2026	RWG Chair



For public enquiries about our
RAP please contact:

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Cover and interior art: Josie Rose, 'Waagay', 2024