



verve  
foundation

*2025*

**impact**  
report

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thank you!

# hello from cathi.

This is the first proper impact report the foundation has produced. And honestly? It's long overdue. We've been heads-down doing the work – helping new people into finance, supporting brilliant new businesses, building a community we're genuinely proud of – but we haven't always stopped to document it as much as we should have.

That changes now. What you'll find in these pages is the most up to date account we can give you of what we've achieved across 2025. In pulling this together we've also identified extra areas of data that we would like to collate and share and so this report will continue to evolve as we build up more of an overarching picture.

The data in this report is already shaping how we do things differently in 2026.

What we do know is this: the Foundation is working. People are building careers they never thought possible. New advice businesses are launching and growing. A community of nearly 200 people is showing up, giving back, and paying it forward. That's real. That matters.

We're grateful to our sponsors for believing in that mission – and for giving us the platform to tell this story properly.

*Cathi*

**Cathi Harrison**  
**Director, Founder**  
**& CEO**



# the **numbers** at a glance.

We'll get into the detail below - but here's the headline picture of what we've built since we started, right up to the end of 2025.

**167**

CII exam passes  
(*all time*)

**14**

full diplomas  
completed

**88**

active New  
Talent students

**70%+**

female participants on our  
New Talent programme

**197**

total incubees  
supported

**26%**

female participants in  
our incubators  
(*vs. 20% average*)

Numbers tell  
part of the story.

The rest of it is in  
the people.

# who are we & why we exist.

Financial services has a problem. Actually, it has a few. There aren't enough new people coming into the profession. The cost of qualifying shuts too many people out. Too many new advice firms launch without enough support and don't make it through the first year. And millions of people across the UK still can't access quality financial advice.

**The Verve Foundation exists to do something about all of that.**

We're a fully independent, standalone not-for-profit, founded in 2021 by Cathi Harrison. Though we share our founder with Verve, the Foundation operates as its own separate organisation – with its own governance, funding, and purpose. Here's our bold mission broken down into four pillars...

## our mission.

1

Bringing new talent into the profession.

2

Helping new advice businesses get off the ground and grow.

3

Building a connected alumni community that pays its success forward.

4

Amplifying our reach through the NewIn Podcast and the Art of Finance.

# what **drives** us.

## the problem

Finance isn't visible as a career for people outside the industry

Qualifications are expensive and the route in is confusing

New advice firms launch without enough support

Alumni leave programmes and lose connection

The public don't see finance as accessible or diverse

## what we do about it

Fully-funded pathways in – no prior qualifications needed

We cover every penny – CII membership, textbooks, exam entries, the lot

Ready, Steady, Go: free programmes for firms at every stage

A community of 200+ people that stays active and pays it forward

Art of Finance, NewIn Podcast, Route to Competency webinars

# newtalent programme.

(formerly We Are Change)

## what we do.

The New Talent programme is exactly what it sounds like: we bring brilliant people into financial services who wouldn't otherwise get through the door. Career changers. School leavers. People who've been made redundant. People who've never even considered finance as an option. If they've got the drive, we've got the support.

## what they get from us.

- fully-funded CII Certificate in Financial Planning qualifications
- all study materials
- regular one-to-ones with an experienced mentor
- peer community support
- workshops on the industry
- help finding a role at the end
- no prior qualifications required = open to everyone

The programme was launched as We Are Change in 2021 – the initiative that started the Foundation itself. What began as a response to pandemic unemployment has grown into something much bigger: a proper talent pipeline for an industry that desperately needs fresh thinking.

## where we are at the end of 2025.

metric	figure
CII exam passes - all time to end of 2025	167
Full diplomas completed - all time to end of 2025	14
Active New Talent participants (as end of 2025)	88
Female participants	70%+
Male participants	30%
New starters on the New Talent programme in 2025	38
Average age	35 (between 19 - 57)

what people said.

"I would like to thank The Verve Foundation for the massive opportunity they provided me through the We Are Change initiative. They helped me transition into a career in financial services through their continuous support. Life changing – cannot thank them enough!"

— **David Haugh, 2021 Cohort**

"The programme has honestly been incredible! The exam support given in the lead up to exams is also great, and I probably wouldn't have passed my previous exams if it wasn't for the weekly quizzes and one-to-one support. I am so close to finishing – it's all thanks to the amazing support I've received."

— **Ola Majekodunmi, New Talent Graduate, 2026**

# adviser incubator.

## what we do.

Starting your own advice firm is brilliant. It's also terrifying. There's a reason so many people talk about going independent and never quite make the leap – and for those who do, the first couple of years can feel very lonely.

The Adviser Incubator exists to change that. Three fully-funded programmes, completely free, for advice firms at every stage.

These programmes were refreshed and redesigned from their original format in response to participant feedback – and the move from a 7-week Consider programme to the one-day Ready? Bootcamp has been particularly impactful, allowing us to reach and support significantly more advisers at the critical 'am I ready for this?' moment.

## an overview of the programmes.

### ready?

A one-day bootcamp for people seriously considering launching their own firm. A safe space to ask the questions you're slightly embarrassed to ask, meet others in the same boat, and figure out whether this is really the right move for you.

### steady:

A 10-week programme for those who've just launched or are about to. One business topic a week, a brilliant community alongside you the whole time.

### go!

A 10-week programme for firms that are up and running and want to grow. Recruitment, scaling, culture – the good stuff.

## the data so far.

metric	figure
Total incubees	197
2026 target (cumulative)	300+
Female participants	26% (industry average: ~20%)
Number of cohorts by end of 2025	20
Direct Authorised firms	32
Network firms	76
Average age	40

# ready? bootcamp.

## what participants told us.

We do collect feedback from every Ready? bootcamp, and the scores speak for themselves.

**42**

attendees across the sessions

**9.8/10**

avg recommendation score

**83%**

scored it a perfect 10/10

"The impartial content and depth of everything covered offered valuable peace of mind and understanding in what would otherwise have been a minefield."

— **Daniel Galbraith, Ready? Bootcamp**

"Having Cathi's and Maddie's expertise in the same room at once alongside like-minded people — their openness and candid answers are truly based on understanding and experience."

— **Chris Pughe, Ready? Bootcamp**

"Honestly, it was fantastic. Great content on the topics we covered. The networking has been invaluable."

— **Siafra James, Ready? Bootcamp**

## what they want more of.

The feedback form also asks what topics participants most want to explore in Steady... – and the same themes keep coming up.

-  **tech selection**
-  **brand & marketing**
-  **building a CIP**
-  **CRP**
-  **understanding the real costs of starting out.**
-  **how to get your first client**

These are feeding directly into the 2026 programme design.

"This programme came at the perfect time for me, just as I was getting my business off the ground. To be able to share ideas with peers, some of whom are already running great businesses, and to learn from some outstanding mentors was invaluable at this early stage."

— **Andy Reynolds, Cohort One**

# our **alumni** community.

Here's something we're really proud of. Nearly 200 people have come through our programmes and stayed. They're not just past participants – they're an active, engaged community that shows up, speaks up, and gives back.

Through fortnightly Lunch & Learn sessions, the Foundation Forever newsletter, the alumni WhatsApp group, and our Tuesday Natters, they stay connected to each other and to the Foundation. And every time an external speaker joins a Lunch & Learn, they make a £500 donation – turning the community itself into a funding mechanism.

It's a force multiplier. The more people come through the Foundation, the stronger the community gets, and the more the next generation of participants benefits.

metric	figure
Active alumni	200+
Lunch & Learn sessions	8 confirmed between March & June 2026
External speakers	6 confirmed & 3 in discussion
Active members in the WhatsApp group	174

# our wider reach.

The Foundation doesn't just support the people already in our programmes – we're also trying to change how financial services is seen from the outside. The Art of Finance is our B2C website, designed to attract people who've never considered finance as a career.

We invested properly in the site in 2025 – and it shows. Monthly traffic now sits at around 706 visits a month.

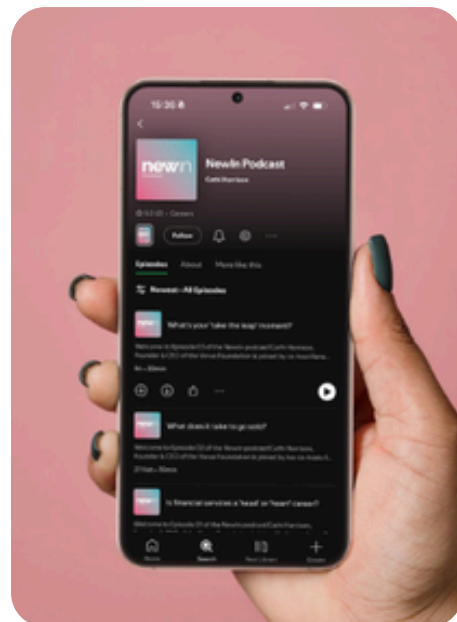
On top of that, our Route to Competency webinars (capped at 20 per session - although we got 24 on our first one!), demystify the process of becoming a regulated financial adviser for people who are considering it but don't know where to start.

metric	figure
The Art of Finance website traffic (2025)	8,469
The Art of Finance 2026 target	10,000
Social media reach (LinkedIn, The Art of Finance)	1,069 followers
Social media reach (LinkedIn, Verve Foundation)	3,000 followers
Social media reach (Instagram, The Art of Finance)	464 followers

# and then there's our **podcast!**

We're so excited about this one. The NewIn Podcast launched on 13 February 2026 in partnership with Royal London — so it sits just outside this report's window, but we'd be doing a disservice not to mention it!

Series 1 features 11 episodes alternating between New Talent graduates and Incubator businesses. The finale drops 10 July 2026. It's already pulling an audience in – and it's a tangible, ongoing demonstration of what partnership possible.



metric	figure
Total downloads (across all audio streaming platforms)	268
YouTube views	343
Episodes launched	4 (as of April 2026)
Total episodes in series 1	11 (finale – 10 <sup>th</sup> July 2026)

# impact **data plan** for 2026.

In early 2026 we developed a formal Theory of Change that maps what we do, what changes as a result, and how we'll measure that over time. It covers six focus areas - attracting talent, supporting advisers, championing diversity, education, busting stereotypes, and closing the advice gap.

The gaps in this report are the direct input into that framework - they've shaped what we're measuring from 2026 onwards.

## current data gaps

Year-by-year New Talent cohort numbers

Employment outcomes for graduates

Full demographic data (age, ethnicity, geography)

Annual Incubator session counts

Steady! satisfaction scores (Week 5 and 10)

## what we're doing about it

Extracting from programme records for the final version of this report

3-month and 12-month follow-up tracking introduced in 2026

Expanded data capture in all 2026 programme applications

Pulling from calendar records; new tracking now in place

Introduced as standard from Cohort 1, 2026

*continued on next page...*

## current data gaps

Business survival rates for Incubator graduates

Lunch & Learn session and attendance data

Formal beneficiary voice data

## what we're doing about it

12-month firm status check introduced in 2026;  
Companies House cross-referencing

Simple attendance tracker now in place; retrospective recovery in progress

Structured participant conversations being introduced across all programmes in 2026

# what's coming in **2026**.

what's coming	the detail
HI Impact Report	Due mid-July 2026. First report against our new measurement framework.
NewIn Podcast Series 1	11 episodes, finale 10 July 2026. We're tracking listener data monthly.
Ready? Bootcamps	5 confirmed: 14 July (London), 22 Sep (Edinburgh), 13 Oct (London), 9 Nov (online), 1 Dec (Darlington)
Steady... Cohort 2	Launching late May 2026
New Talent 2026	Targeting 20 new starters – short cohort model running alongside the main cohort
Recruitment Service	Live April 2026. B2B and B2C. Placement fees fund more student places.
Full-year Impact Report	January 2027 – covering all of 2026 with properly collected data throughout

# our 2026 goals.

**280+**

firms through the  
incubator (cumulative)  
(up from 168 today)

**20**

new starters on the New  
Talent programme  
(at least!)

**300+**

active alumni  
(Lunch & Learn attendance  
maintained and growing)

**70%+**

female on New Talent  
(and improve on 26% on  
incubator)

**more  
voices**

captured through our data  
feedback collection model.

**h1 impact  
report**

shared in July 2026.

# thank you!

None of this happens without the people who believe in it. The sponsors who back us. The mentors who give their time. The alumni who keep showing up. And the remarkable people who trust us with the beginning of their careers.

**Questions about this report? Get in touch.**

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