Sustainability preferences questionnaire



There are many ways to invest, and there is no one-size-fits-all approach to including sustainability preferences into an investment portfolio. This questionnaire is designed to explore what approach best fits your personal values and provide a starting point for discussion with your financial planner. The questionnaire was designed by our chosen partner – EQ Investors, a sustainable investment specialist that provides a range of different portfolios that can meet both your financial and sustainability objectives.

Name(s):

rtame(e).			
1	I would like to have the flexibility to invest in less responsible companies if they are considered to offer attractive overall financial gain.	5	Climate change is a key concern for me and I would like my investments to focus on this challenge, above any other sustainability challenges.
	Agree Disagree		Agree Disagree
2	I would like to avoid investing in business activities that are harming people and planet. This goes further than minimum exclusions such as tobacco, weapons and gambling and would also exclude activities like fossil fuel and alcohol production.	6	I would like to invest in companies across a broad spectrum of sectors, but need them to have a focus on managing their operational environmental impacts, their employees and strong governance.
	Agree Disagree		Agree Disagree
3	I would like my investments to be managed with maximum flexibility. This means any investment is eligible without considering sustainability.	7	I am happy to invest in businesses that have high carbon emissions today, if there is a dedicated objective to reduce the carbon footprint of my investments through active engagement and stewardship.
	Agree Disagree		Agree Disagree
4	I would like to maximise investments in solutions to social and environmental challenges (e.g. healthcare, clean water, climate change or education) while avoiding unsustainable activities.	8	I would like my investments to meet my sustainability preferences but my priority is to invest at low cost.
	Agree Disagree		Agree Disagree
	Conclusion and other thoughts you may have:		

The information contained in this questionnaire should not be considered either as a personal recommendation to invest or confirmation of suitability of any investment for your personal circumstances. If you are unsure about any investment, seek independent financial advice. Regulated financial advice should be sought before investing into EQ's portfolios. Past performance is not a guide to the future. The value of investments and the income derived from them can go down as well as up and clients can get back less than they originally invested. EQ'Investors Limited is a trading name of EQ Investors which is registered in England & Wales at 6th Floor, 60 Gracechurch Street, London EC3V 0HR. Company Number 0722330.