



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):

1 I would like to have the flexibility to invest in less responsible companies if they are considered to offer attractive overall financial gain.

Agree
Disagree

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

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.

Agree
Disagree

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

3 I would like my investments to be managed with maximum flexibility. This means any investment is eligible without considering sustainability.

Agree
Disagree

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

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.

Agree
Disagree

8 I would like my investments to meet my sustainability preferences but my priority is to invest at low cost.

Agree
Disagree

Conclusion and other thoughts you may have: