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 do not want my investments to be restricted by a sustainable objective.	5	I would like to invest in companies with the most responsible environmental, social and governance practices (leading ESG companies) in their sector.
	Agree Disagree		Agree Disagree
2	I would like to maximise investments in solutions to social and environmental challenges (e.g. climate change, healthcare, clean water or education).	6	Climate change is a key concern for me and I would like my investments to focus on this challenge.
	Agree Disagree		Agree Disagree
3	I would like to avoid investing in most business activities that are materially harming people and planet.	7	I am happy to invest in businesses that have a negative climate impact today, if there is a dedicated objective to reduce the carbon footprint of my investments through active engagement.
	Agree Disagree		Agree Disagree
4	I would like to invest with maximum flexibility. This means any sector, country, company, or asset class could be included.	8	I would like my investments to reflect sustainability preferences but am happy with a passive investment approach, which is data driven.
	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.