



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.

Agree
Disagree

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

2 I would like to maximise investments in solutions to social and environmental challenges (e.g. climate change, healthcare, clean water or education).

Agree
Disagree

6 Climate change is a key concern for me and I would like my investments to focus on this challenge.

Agree
Disagree

3 I would like to avoid investing in most business activities that are materially harming people and planet.

Agree
Disagree

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

4 I would like to invest with maximum flexibility. This means any sector, country, company, or asset class could be included.

Agree
Disagree

8 I would like my investments to reflect sustainability preferences but am happy with a passive investment approach, which is data driven.

Agree
Disagree

Conclusion and other thoughts you may have: