



Sustainability preferences questionnaire

This short questionnaire is designed to explore whether you are interested in exploring sustainability in your investments, alongside your financial goals. We will ask you questions about the types of companies you'd like to see, exclude or engage with and the degree of focus you'd like to have on this. Please do not hesitate to select "disagree" across these questions if you are not interested in exploring sustainability preferences. The results will help your financial adviser understand which approach best fits your personal preferences and provide a starting point for further discussion.

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):

It is important to me to exclude businesses that have I would like to focus my investments in solutions to an overwhelming negative impact on people and social and environmental challenges (e.g. climate change, healthcare, clean water or education). planet today (e.g. tobacco, fossil fuel production, gambling, arms) Agree Agree Disagree Disagree I would like to invest in businesses across most I am happy to invest in businesses that have negative impacts today (including on climate) if sectors, which lead in environmental & social there is a strong plan to improve on these management, and show good governance (ESG weaknesses, including by active investor leaders). engagement. Agree Agree Disagree Disagree Climate change is a key concern for me and I would like my investments to focus on this challenge. 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. EQ/0225/103.