



# 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):

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

Agree  
Disagree

**2** It is important to me to exclude businesses that have an overwhelming negative impact on people and planet today (e.g. tobacco, fossil fuel production, gambling, arms)

Agree  
Disagree

**3** I am happy to invest in businesses that have negative impacts today (including on climate) if there is a strong plan to improve on these weaknesses, including by active investor engagement.

Agree  
Disagree

**4** I would like to invest in businesses across most sectors, which lead in environmental & social management, and show good governance (ESG leaders).

Agree  
Disagree

**5** 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: