

SRI StyleFinder Questionnaire

Welcome to 'SRI StyleFinder' Questionnaire. This tool helps you identify your preferred 'sustainable', 'responsible' or 'ethical' investment Style(s) and helps you to prepare for discussing this area with your financial adviser.

Name:

Date:

Circle one or more of the 'SRI Aims' below that best represent your opinions or aims:

- 1** I would like to ensure that investment risks relating to poor management of environmental, social and/or governance issues are not ignored by fund managers.
- 2** I am looking to invest in a fund which favours forward looking, sustainable companies that manage issues such as the efficient use of resources, stakeholder relations, carbon emissions and social impacts well.
- 3** I want to invest in a 'conventional' ie not 'ethical' investment where my money is used to encourage companies to improve their environmental and social standards.
- 4** My main area of interest is environmental issues such as climate change. I am keen to invest in a fund which prioritises this area and invests in companies that are helping to solve related issues.
- 5** I don't mind where I invest but I want to find a fund manager who uses the fact that they are part owners of companies to encourage better management of environmental, social and governance issues.
- 6** There are a number of 'unethical' business behaviours that I would like to avoid. The fact a company may also 'do good things' does not outweigh my wish to avoid areas like tobacco, armaments manufacture or gambling.
- 7** My main 'ethical' area of interest is people both in the UK and overseas. Areas of interest include employment, health and the provision of necessary services.
- 8** I want to invest in a way that is consistent with my faith and faith related personal values.
- 9** I do not mind where I invest but expect a fund manager to think longer term and encourage more responsible, sustainable business strategies as 'part owners' of the companies it invests in.
- 10** I want to invest in 'decent', 'more ethical' companies with sound environmental, social and governance policies and practices but understand that for some larger companies there may be areas where some compromises have to be made.
- 11** I want to avoid investing in armaments and tobacco companies. I would also like to avoid other areas that I believe are 'unethical' for example gambling, poor animal welfare, pornography, nuclear power.
- 12** My main aim is to encourage progress by investing in ethically sound companies. There are also industries I would like to avoid but I am comfortable making allowances in some areas if necessary.
- 13** I am interested in a wide range of issues but my main area of interest is the environment. I would like to find investment options that focus on finding companies with strong environmental practices.

- 14** I want to invest in line with the values that form the basis of my faith.
- 15** I am keen to invest in companies with strong environmental policies and practices particularly if they are involved in developing solutions to environmental challenges.
- 16** I am keen to invest in a fund that researches what companies do across a wide range of ethical, environmental and social issues and only invests in those where their positive practices strongly outweigh any negative attributes.
- 17** I would like to invest in a fund which focuses on social issues such as job creation, essential services and employment practices.
- 18** I want to find a fund that invests in line with my religious views, where there are experts in place who can interpret how company activity relates to religious standards.
- 19** I am keen to invest in companies that are leaders in the management of longer term sustainability related (eg environmental and social) issues and understand the changing business landscape.
- 20** I wish to invest with a fund manager that thinks about environmental, social and governance issues for all investments but I do not want to invest in an ethical or themed fund.
- 21** I would like to invest in decent companies with strong ethical standards avoiding all companies in unethical industries or with poor ethical, social or environmental practices.
- 22** I am keen to invest in companies and industries which are clearly helping people to make the necessary transition towards more sustainable lifestyles.
- 23** I am interested in the ESG (environmental, social and governance) agenda as I believe such issues are a potential risk to investors. I would be interested in finding a fund manager who manages this risk for all (ethical and non ethical) funds.
- 24** My ideal investment would put significant emphasis on social issues when selecting where to invest. This is more important to me than other 'ethical' issues.
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Notes:

Please use this space to record any particular areas of interest that you may wish to discuss further with your adviser.