

Welcome to 'SRI StyleFinder' tool.

This questionnaire will help identify the sustainable, responsible, ESG and/or ethical investment 'SRI Styles' that are most likely to be of interest to you before you discuss this area in detail with your adviser.

Your Details

Name: _____

Date: _____

Your Aims

Select one or more aim:

- 1 My main aim is to invest in decent, ethically sound companies - in part because I believe it makes good business sense. I'd prefer to avoid areas like tobacco and armaments as well as companies with poor environmental and social practices. I would probably be ok making an exception - for example - if a company was sorting out a recent problem.

- 2 I'd like to invest in a fund that focuses on reducing the risks associated with holding companies where things may go wrong because they have poor Environmental, Social and/or Governance practices by investing in more 'sustainable' companies. I'd quite like to exclude one or two areas like tobacco and armaments production - but am not keen on going too far down that route.

- 3 I am looking to invest in a fund where their main focus is finding forward looking companies that focus on addressing sustainability issues - including climate change. Ideally I want to invest in a way that helps deliver positive impacts and will help both people and planet.

- 4 My main area of interest is environmental issues like climate change and resource efficiency. I am keen to invest in a fund that holds companies that are helping to address environmental challenges as part of their core business.

- 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 I am happy to invest in almost all types of companies but would like to have more of my money directed into companies that have better sustainability policies and practices.

- 7 My main area of interest is people - both in the UK and overseas. Areas of concern to me include employment practices, health and the provision of necessary services.

- 8 I want to invest in a way that is consistent with my faith and reflects my personal religious values.

- 9 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 trade offs may have to be made.

Your Aims - Continued

- 10** My main aim is to avoid investing in companies I consider to be unethical such as armaments and tobacco companies. I also care about environmental and social issues and if possible would also like to avoid companies involved in gambling, poor animal welfare and pornography.
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- 11** 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.
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- 12** I am keen to invest in companies with strong environmental policies and practices particularly if they are involved in developing solutions to environmental challenges.
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- 13** I am keen to invest in a fund that pays careful attention to what companies do across a wide range of ethical, environmental and social issues and invests in companies that have sound, responsible, forward looking business practices.
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- 14** I would like to invest in a fund which focuses on social issues such as job creation, essential services and employment practices.
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- 15** 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.
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- 16** I am keen to only invest in companies that are leaders in the management of longer term sustainability related (eg environmental and social) issues - that understand and are helping to shape the emerging business landscape.
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- 17** I would like to invest with a fund manager who focuses on the management of environmental, social and governance issues - particularly those risks that may damage performance. I am not looking to necessarily exclude lots of industries.
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- 18** 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. I want the fund to be as 'strict' as possible.
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- 19** I am keen to invest in companies and industries that are clearly helping people to make the necessary transition towards more sustainable lifestyles.
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- 20** I want to invest in a way that pays close attention to ESG (environmental, social and governance) issues as I believe such issues are a major risk to investors. I'd ideally like to avoid some core ethically controversial areas but this is not really my top priority.
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- 21** My ideal investment would put significant emphasis on social issues like human rights, health and diversity. This is more important to me than other 'ethical' issues.
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- 22** My top priority is environmental issues.
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- 23** I think sustainability issues are increasingly likely to effect investment returns. I do not want to exclude lots of areas though and would want to invest across most types of businesses (maybe excluding eg tobacco and armaments).
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- 24** I'd be interested in investing in line with an individual environmental theme - such as agriculture or water - providing the companies involved had sound sustainability standards.
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