



CLW/WOMEN

Financial Planning designed by women for women



Responsible Investing

Questionnaire



www.cl4women.co.uk

Would you like your money to make a Positive Impact?

***Basis of Questionnaire;** the idea of this questionnaire is to better understand some of your views and values and if you like the idea of these being reflected in your investments. How you answer these questions will not necessarily limit the investments we show you. In essence the questionnaire is designed to provoke thought on your views and values.*

NEW YORK – At the United Nations Sustainable Development Summit on 25 September 2015, more than **150 world leaders** adopted **17 Global Goals** as part of the 2030 Agenda for Sustainable Development:

SUSTAINABLE DEVELOPMENT GOALS



The global economy is ultimately dependent on how well we manage the world's resources. We face many challenges – more older people putting pressure on healthcare systems; more people eating more food; climate change; polluted air; demand for clean water exceeding supply; and many more besides. But **these challenges create opportunities** that act as tailwinds for companies providing solutions to these problems. In turn, this creates opportunities to invest in these types of companies which benefit from these long term trends, and to avoid investing in companies that fail to address these challenges.

Questionnaire

Name:

- 1 Thinking about any personal views you may have for environmental and social issues, how important is it to you that your investments also reflect these concerns? (Examples of such issues include tackling climate change, reducing water wastage, improving access to healthcare and education etc.)

Select one of the following:

- Very important Important
 A little important Not important *(If you tick this answer please do not complete the survey further)*

- 2 In terms of balancing these personal views with your financial goals, how would you rank the following in order of importance?

(1 = most important, 4 = least important)

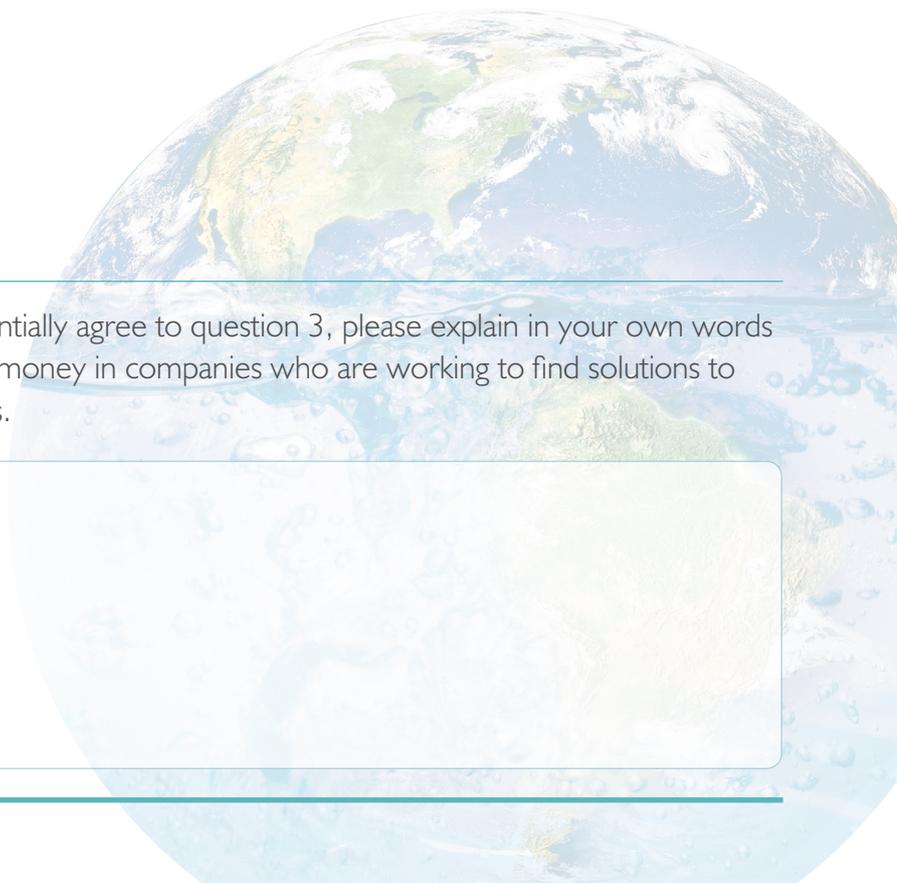
- Preservation of capital
 Maximising financial return
 Avoiding ethically unacceptable activities (e.g. tobacco, armaments)
 Having your investments contribute to beneficial social or environmental impact

- 3 How much do you agree with the following statement: "I prefer to invest in companies whose core activity is to find solutions to major social or environmental challenges"?

Select one of the following:

- Strongly agree
 Tend to agree
 Potentially agree
 Tend to disagree
 Strongly disagree

- 4 If you have selected strongly/tend to/potentially agree to question 3, please explain in your own words why it is important for you to invest your money in companies who are working to find solutions to major social and environmental challenges.



5 Considering the information contained within our Guide to Responsible Investing and your answers to the above questions, which of the following investor types do you think is most aligned to you and your views/beliefs? (Please tick box at base).

<p>1</p> <p>TRADITIONAL INVESTOR</p> <p>For investors who have no particular concerns regarding responsible investing. Traditional investors are typically prepared to invest into any company/sector with a view to making a positive return.</p> <p><input type="checkbox"/></p>	<p>2</p> <p>VALUES INVESTOR</p> <p>For investors with particular ethical or religious views who do not wish to invest in certain types of companies.</p> <p><input type="checkbox"/></p>	<p>3</p> <p>SUSTAINABLE INVESTOR</p> <p>For investors who want to reduce exposure to the long-term risks associated with ESG factors and companies which fail to meet recognised sustainability standards, while seeking improvement in business practices through targeted engagement.</p> <p><input type="checkbox"/></p>	<p>4</p> <p>THEMATIC INVESTOR</p> <p>For investors seeking to benefit from exposure to a specific ESG theme in their portfolio.</p> <p><input type="checkbox"/></p>	<p>5</p> <p>IMPACT INVESTOR</p> <p>For investors seeking to make a positive difference and a return through exposure to companies that intentionally deliver products or solutions that have a measurable beneficial impact on the environment and/or society.</p> <p><input type="checkbox"/></p>
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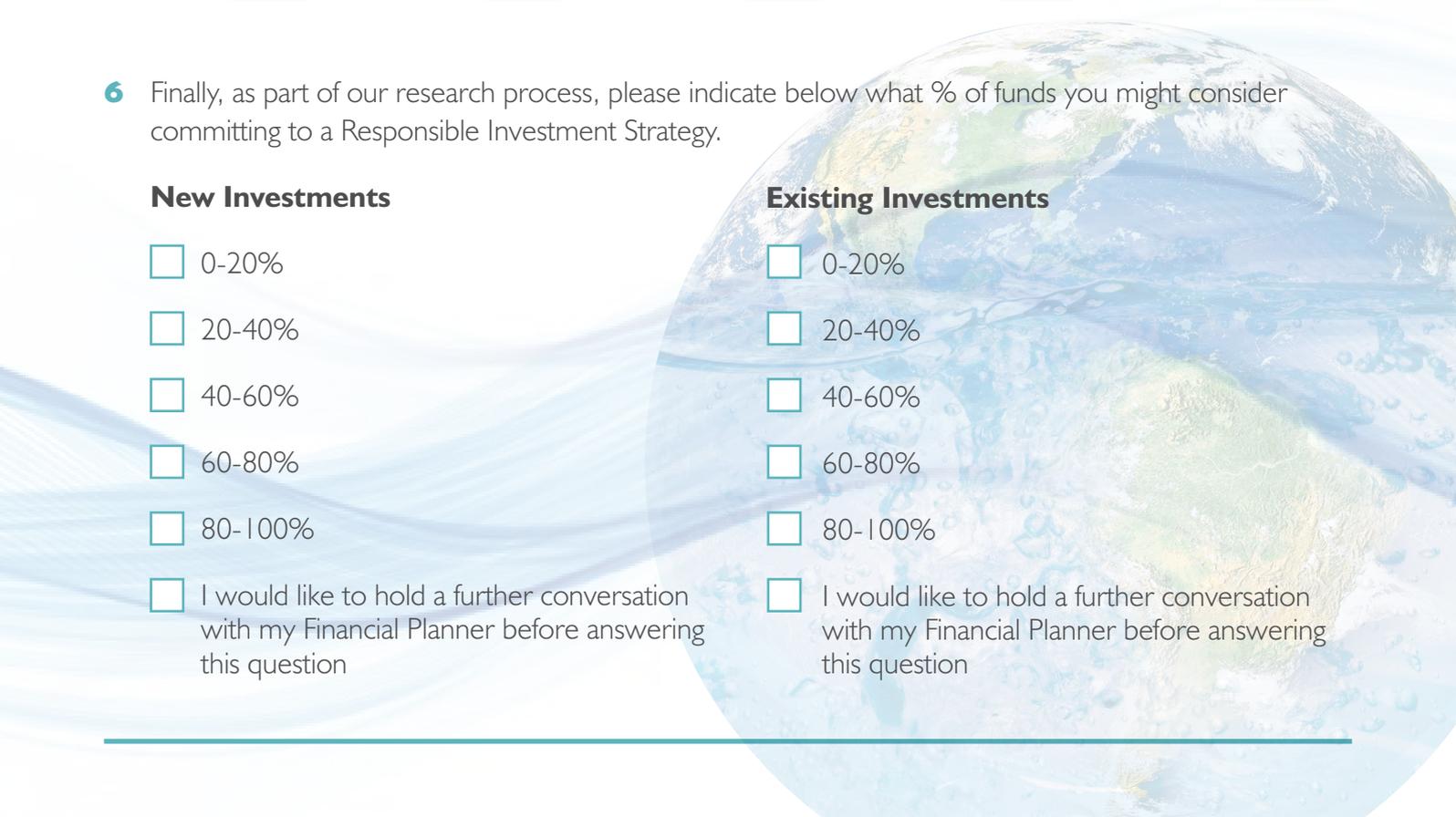
6 Finally, as part of our research process, please indicate below what % of funds you might consider committing to a Responsible Investment Strategy.

New Investments

- 0-20%
- 20-40%
- 40-60%
- 60-80%
- 80-100%
- I would like to hold a further conversation with my Financial Planner before answering this question

Existing Investments

- 0-20%
- 20-40%
- 40-60%
- 60-80%
- 80-100%
- I would like to hold a further conversation with my Financial Planner before answering this question



Example Problems and Solutions



PROBLEM:

Detecting pesticides in our food

There is growing scientific evidence that some synthetic pesticides are harmful to humans, increasing the risk of attention deficit disorder, autism, and other health problems. With food supply chains becoming more and more global, it is increasingly difficult for the food industry to assess the level of pesticides within their products.

A recent study showed that food often contains multiple pesticide residues, which makes the task of assessing overall toxicity even more difficult.

SOLUTION: **Food safety testing**

Agilent Technologies is a world leading company in detecting pesticide contamination in our food. Confronted to a huge increase in the number of contaminants, the company has developed technologies used for high-throughput food safety testing which can be used across the food supply chain.



PROBLEM:

Saving London's Water

London suffers from serious water stress. The city's water comes from two rivers, the Thames and the Lea, and a limited number of boreholes. Being one of the driest capitals in Europe, it is vulnerable to drought. Yet with many of its water mains dating back to the Victorian era, around 30% of London's water is lost due to leaks.

SOLUTION: **Leak detection**

Pure Technologies is a US listed company that provides new solutions for leak detection. Their roving acoustic sensors can be run through in-service water mains, pinpointing every leak in a pipe system to help target maintenance work.



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Proud members of

UKSIF

UK Sustainable Investment
and Finance Association

Lets talk

Take the first step on your new financial journey, call us today for an obligation free meeting about your future with our financial and retirement investment specialists.

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