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Environmental, Social and Governance (ESG) Investing Questionnaire CONFIDENTIAL

Full Name	

The following questions are asked in order to obtain an idea of your ESG preference:

	Questions	Strongly/ Important	Neutral
1	How important is it to you to invest in companies that take environmental, social and governance - or 'ESG' factors - into account?		
2	How strongly do you feel about environmental factors such as climate change and a company's environmental footprint?		
3	How strongly do you feel about companies addressing social issues such as workplace diversity, equal opportunities and decent working conditions for its employees and suppliers?		
4	How strongly do you feel about the importance of companies having effective policies in place to protect against fraud, breaking industry rules and regulations, or other malpractice by their management?		
5	How important is it to you to have your money invested in companies that are actively trying to make a positive societal change, even if these companies are more specialist and potentially riskier?		
6	Positive impact investing aims to provide both an investment return and a positive societal change. Do you have an interest in this type of investing? If yes it's important to you, please also give details in the next section.		
7	Are there any types of companies that you want to avoid investing in? (e.g. armaments, tobacco, animal testing, etc.). If yes it's important to you, please also give details in the next section.		
8	Are there any particular service sectors or industries you wish to avoid investing in because of their negative environmental impact ? If yes it's important to you, please also give details in the next section.		

If you have answered 'Yes it's important' to any of Questions 6, 7 and/or 8, please provide details below:-

If there is insufficient room to detail all of the information please continue on a separate sheet of paper.

Signed: _____   **Date: _____**

Name: _____

ESGQ-2021