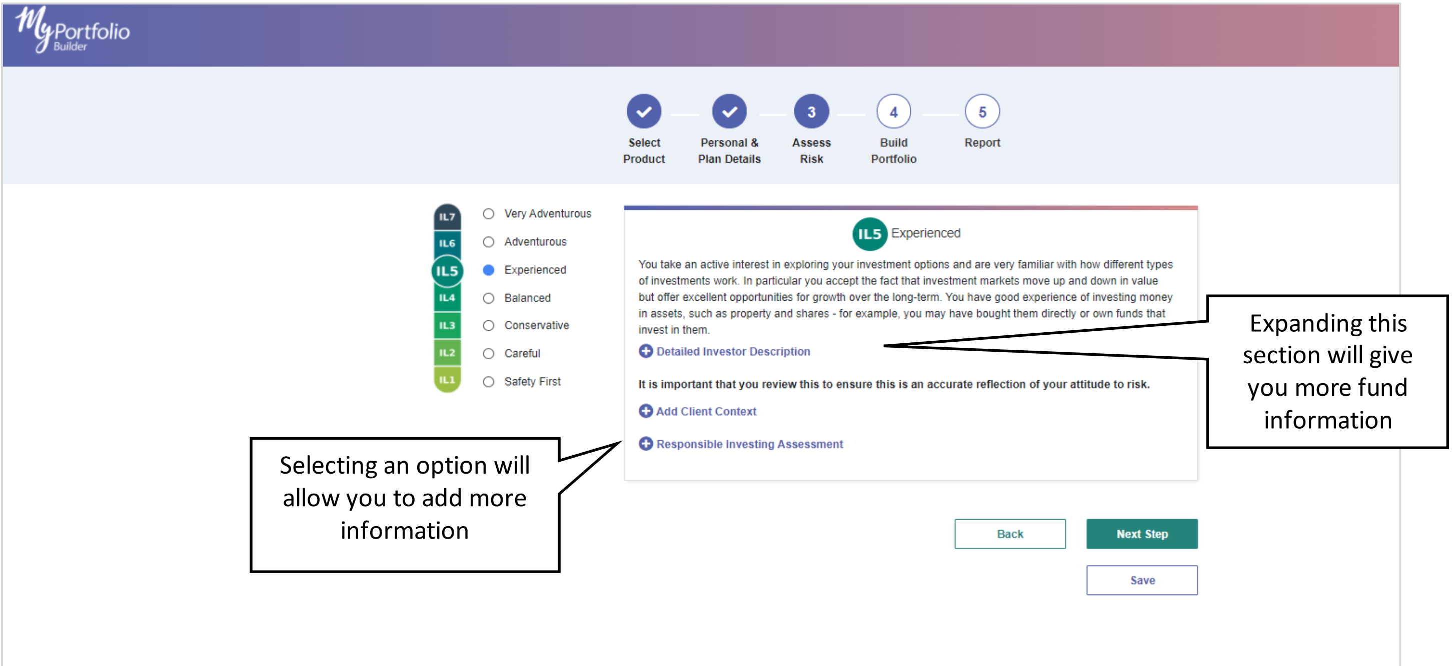
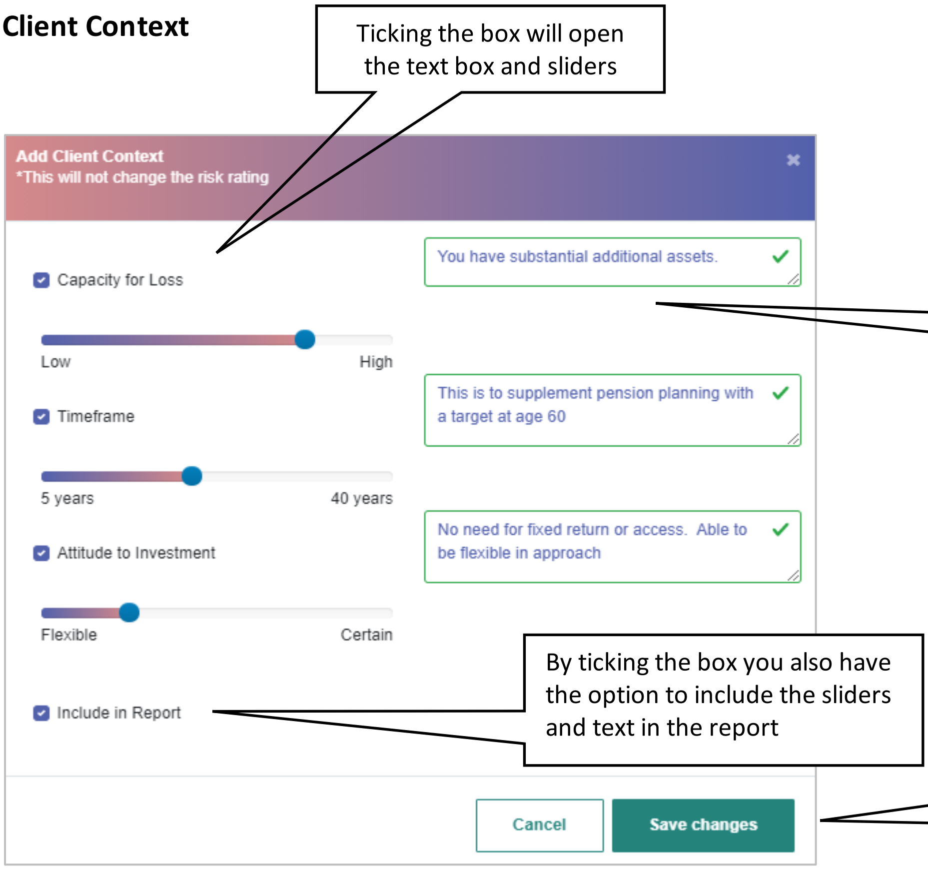
CLIENT CONTEXT & RESPONSIBLE INVESTING

Client Context & Responsible Investing

Allows you to capture information relating to client circumstances to support fund advice. This will not change your risk rating.



Client Context



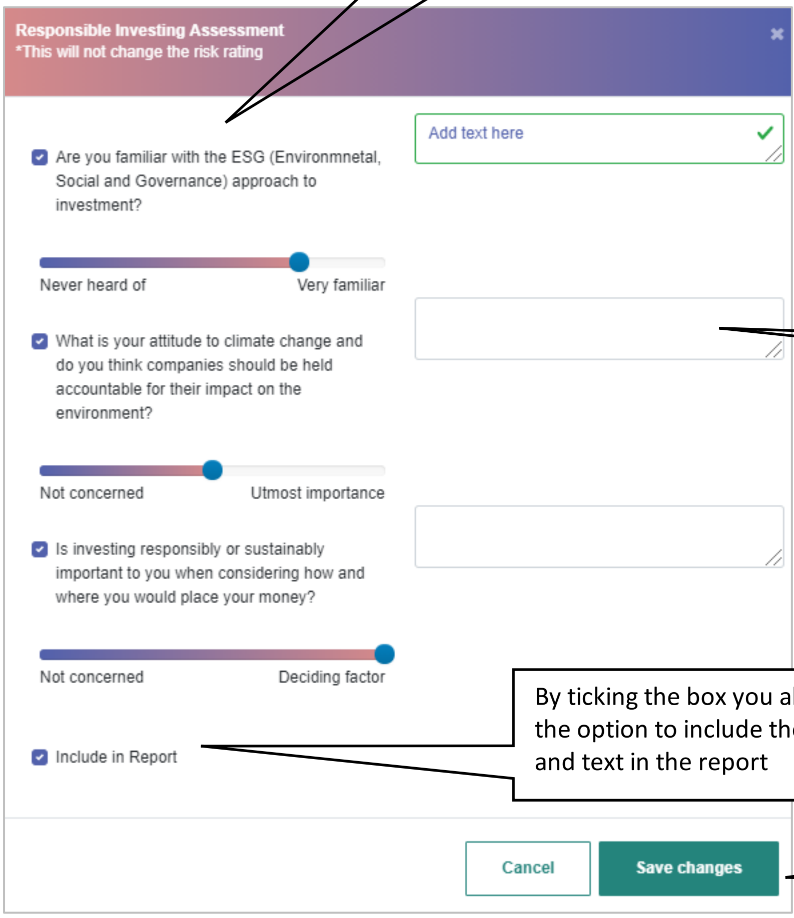
Select **Save Changes** to save and move to the next screen

CLIENT CONTEXT & RESPONSIBLE INVESTING

Responsible Investing

Responsible Investing
3 ESG specific questions help you to meet your SFDR requirements

Ticking the box will open the text box and slider



Sliders and text displays on screen

By ticking the box you also have the option to include the sliders and text in the report

Select **Save Changes** to save and move to the next screen

This feature does not drive a dynamic consequence – you remain in control of your advice