

## 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

## 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

**Responsible Investing Assessment**  
\*This will not change the risk rating

Are you familiar with the ESG (Environmental, Social and Governance) approach to investment?

Add text here ✓

Never heard of ————— Very familiar

What is your attitude to climate change and do you think companies should be held accountable for their impact on the environment?

Not concerned ————— Utmost importance

Is investing responsibly or sustainably important to you when considering how and where you would place your money?

Not concerned ————— Deciding factor

Include in Report

Cancel Save changes

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