

Dear xxxx

We welcome your views on Positive Investing

As your financial adviser, I would like your help. In light of progress in the area of Positive Investing, it would be really helpful if you could complete the attached questionnaire.

Positive investing is simply investing in funds/portfolios, where the underlying investments display good practice in ESG. **E** stands for environmental benefits, **S** stands for social benefits, and **G** stands for governance standards (other past descriptions include ethical, green or sustainable).

The factsheet gives you information on the results gathered over ten months. It also includes information on the United Nations 17 Sustainable Development Goals, and how investing can make a difference.

Could you complete the attached survey and return it to me in the enclosed prepaid envelope by **DATE**.

Your personal feedback will only be known to [entre company name]. However anonymously your data will be added to others to help give a broader picture.

I really appreciate you helping me on this one. It will ensure that I am up to speed on all our client's concerns and objectives.

Yours sincerely,

NAME

We appreciate your assistance, but if you would rather we did not include you in such future exercises please let us know and we will remove your details.