

Positive Investing Questionnaire

Private & Confidential

Client Name:

Date:

Positive Investing Questionnaire

NAME provides investment recommendations to investors who wish to incorporate their positive investing values in to the construction of their portfolios.

In order to facilitate this process, we would like to know to what extent you see the importance of positive investing as highlighted in this questionnaire.

For the first two questions, please give an answer between 1 - 5, where 1 is no knowledge, concern or interest, through to 5 for substantial knowledge, concern and interest. For the remaining questions a simple Yes/No answer is required.

| Please rank the below statements: | Importance/Concern/Relevance to you | | | | | Comments |
|------------------------------------------------------------------------|-------------------------------------|---|---|---|---|----------|
| | 1 | 2 | 3 | 4 | 5 | |
| I have concerns about the long term sustainability of our planet. | | | | | | |
| I have concerns about the corporate practices of some large companies. | | | | | | |

| Please answer 'yes' or 'no' to the below statements: | Yes | No | Comment |
|----------------------------------------------------------|-----|----|---------|
| Before today's survey I was aware of Positive Investing. | | | |
| I have already invested positively. | | | |

| | | | |
|---------------------------------------------------------------------------------------------------------|--|--|--|
| I know where to find positive investments suitable for me. | | | |
| Before today's survey I had thought that Positive Investing might mean lower investment returns. | | | |
| Now I have thought about it, I like the idea of investing some of my portfolio in Positive Investments. | | | |
| I think positive investments may be more risky than traditional investments. | | | |
| I would invest positively if my adviser made it straightforward for me to do so. | | | |

We would welcome any further comments, please provide details below:

Thank you for taking the time to complete this survey, your opinions really do matter to us.

Once completed, please return in the pre-paid envelope provided by DATE.