

Casterbridge Wealth Impact Questionnaire

The aim of this questionnaire is to help your Financial Advisor determine which Casterbridge Wealth service is most suitable for you.

How we live our lives and the views we have should shape the way that we invest our money. Please answer the following questions, for each noting how important the section is to you. The questionnaire is designed to determine whether any of these factors are equally as important to you as your financial objectives. Several examples have been provided to give you an idea of the different considerations for each factor.

Environmental Factors

Environmental considerations focus on the human impact on the world and that this impact is sustainable. Sustainability means that we live in such a way today that the world is not damaged tomorrow.



- I am concerned about carbon emissions and their effect on climate change.
- I am concerned about the rapid decrease in biodiversity across the globe.



- It is important that we decrease our reliance on fossil fuels and move to renewable energies.
- It is important to limit waste and reduce, reuse or recycle what we consume.



Considering the above examples, how important are environmental factors to you?

Social Factors

Social factors concentrate on well being of communities. They include basic human rights, such as clean water and education, as well as healthcare and fair-traded goods.



- I believe all people should have access to clean and safe drinking water.
- It is important that all children have a right to free school education.
- I believe childcare, maternal health and disease prevention are important factors in social welfare.



- I am aware of what I eat or am actively choosing alternative diets. i.e. vegetarian or vegan substitutes.



Considering the above examples, how important are social factors to you?

Governance Factors

Governance Factors address equal opportunities in work and social environments as well as co-operation to address the environmental and social objectives above.



- It is important that there is no discrimination based on race, gender or sexuality.
- It is important that we work together to meet the above goals on a community, national and global level.



Considering the above examples, how important are governance factors to you?

Based on your above answers, are any of the factors mentioned as important to you as your financial objectives?

Yes No

Our Sustainable Impact portfolio has the same objective return and target volatility as our traditional models. However, ESG investing typically has a smaller investable market than traditional investing and therefore there is a risk that volatility may be higher.

Are you willing to take the risk (not guarantee) that short term volatility may be higher than a traditional portfolio?

Yes No

Answering 'Yes' to the above question indicates that our Sustainable Impact portfolio, which is a Full ESG portfolio is suitable for you.

Answering 'No' to the above question indicates that one of our Bespoke or Hardy services with ESG Integration may be more suitable for you.

Important Information

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