

Best Adviser Firm for ESG ENTRY FORM TEMPLATE

Please note, this form will not be accepted as your entry. It is a template that you can use offline while you prepare your entry. When you're ready, you will need to submit your entry online.

Contact Name:

Contact Job Title:

Organisation:

Contact Phone Number:

Contact Email Address:

Please give a brief overview of how you have approached integrating ESG factors within your firm, including investment processes and client proposition. Why has this been important for the company? (Max 200 words)

What developments have you made, particularly over the past 12 months? What have been your priorities and significant achievements? (Maximum 250 words)

What staff/resources have been made available both internally and externally to support this move? What training have you provided to staff? (Max 150 words)

Please explain how you communicate with clients about ESG issues, how ESG fits within your suitability framework and how you select the right solutions to meet client demand in this area? - (Max 250 words)

What is the next stage in the development of the firm in terms of ESG? (Max 150 words)

Should you win, please state the official name of the company as you would like it to appear on announcements and on the award:

Please provide your twitter handle:

Please attach your company logo:

ALL ENTRIES MUST BE RECEIVED ONLINE BY 8TH JANUARY 2021