

Best Multi-Asset Fund 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:

Can you give a brief overview of your multi-asset fund, including what you are trying to achieve for investors and how ESG factors fit into this? Please also include fund performance against your objective/benchmark/sector over one, three and five years (if data is available) to the end of October 2020. (Max 150 words)

Can you demonstrate how you have been successfully integrating ESG factors into your multi-asset investment process? How long has this been a key part of your investment approach and what does it add from a multi-asset perspective? How do you guard against greenwashing in what you do? What benchmarks or frameworks do you use to ensure ESG objectives are met? What impact has it had for investors? (Maximum 250 words)

Can you highlight recent developments on the multi-asset fund in the last year in the area of ESG? This could include particular themes being played out in the fund, new additions to the portfolio or enhancements to the investment process. (Max 200 words)

What actions have you taken to educate and support advisers and investors on ESG investment issues, especially in the last 12 months? Can you demonstrate excellence in how you communicate with advisers and clients to ensure they understand your ESG offering and how it meets their needs? (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