

Roberts Clark IFS Limited - ESG - Environmentally Friendly, Socially Responsible and Corporate Governance Investment

Helping both you and us identify your views/preferences in connection with Green/Ethical/Environmentally Friendly/Socially Responsible/Corporate Governance Investment.

Your Full Name

Today's Date

No Strong Views? If you have no strong views on ESG, are happy to invest across a broad spectrum and do not wish to complete this form place an "X" here:

Key for ESG Responses:

Totally Exclude

means these areas will not be considered

Happy to Invest

means these areas will be considered

Progress in Sector

means you are neutral i.e. sector may be considered for Funds and Firms progressing towards ESG

No Strong Views

means you are happy to invest in the sector

Put 'X' in boxes that apply (blanks assumed Happy to Invest)	Totally Exclude	Happy to Invest	Progress in Sector	No Strong Views
Areas with POSITIVE Impact				
Air & water quality				
Carbon credit trading				
Education & learning				
Energy efficiency				
Energy storage (batteries etc)				
Environmental consultancy				
Healthcare				
Environmentally friendly food production				
Renewable energy				
Resource management & recycling				
Health, Safety & Security (workplace)				
Sustainable forestry				
Sustainable products (plastics solutions etc)				
Public Transport				
Infrastructure (low carbon solutions)				
Fitness & Wellbeing				

Areas with NEGATIVE Impact	Totally Exclude	Happy to Invest	Progress in Sector	No Strong Views
Animal Welfare				
Animal testing - cosmetics				
Animal testing - chemicals				
Animal testing - health				

Animal products - production				
Animal products - retail				

Environment	Totally Exclude	Happy to Invest	Progress in Sector	No Strong Views
Air transport				
Genetically modified food - production				
Intensive farming				
Poor environmental management				
Wood - unsustainable production				

Human Welfare	Totally Exclude	Happy to Invest	Progress in Sector	No Strong Views
Adult entertainment				
Alcohol production				
Armaments (harmful devices/equipment)				
Defence (non-harmful devices/equipment)				
Gambling				
Human Rights Abuses				
Oppressive regimes				
Tobacco production				

Corporate/Governance	Totally Exclude	Happy to Invest	Progress in Sector	No Strong Views
Poor labour management				
Aggressive tax practices				
Excessive board level remuneration				

INDUSTRIES with both Positive and Negative Impact				
Energy, Fossil Fuel, Mining	Totally Exclude	Happy to Invest	Progress in Sector	No Strong Views
Electricity				
Gold & Precious Metals/Stones				
Mining				
Oil & Gas (sales)				
Oil & Gas – exploration and production				
Gas networks				
Nuclear Power				

Financial Services	Totally Exclude	Happy to Invest	Progress in Sector	No Strong Views

Banks – commercial/retail lenders				
Banks – ethical banking & lending policy				
Challenger Banks				
Government debt				
Insurance & Investment				

IT & Communications	Totally Exclude	Happy to Invest	Progress in Sector	No Strong Views
IT software				
Media (newspapers, TV, radio etc)				
Telecommunications				
Data Security				
Social Media				

Manufacturing	Totally Exclude	Happy to Invest	Progress in Sector	No Strong Views
Vehicles - internal combustion engines (ICE)				
Chemicals				
Electronic/Electrical products				
Electric vehicles				
Hydrogen Vehicles				
Engineering				
Paper & packaging				

Property and Construction	Totally Exclude	Happy to Invest	Progress in Sector	No Strong Views
Commercial property, e.g. offices, warehouses, shops				
Medical property				
Residential property (private)				
Social Housing				
Road construction				
Student accommodation				

Retail and Sales	Totally Exclude	Happy to Invest	Progress in Sector	No Strong Views
Vehicles (petrol/diesel) sales/lease				
Vehicles (electric/hydrogen) sales/lease				
General Retailers (High Street)				
General Retailers (Online focused)				
Supermarkets				

Socially Postive Projects	Totally Exclude	Happy to Invest	Progress in Sector	No Strong Views
Community business				
Community property				
Micro-finance				
Fair trade				
Locally sourced food				
Renewable energy – community owned				
Social welfare				

Copyright © 2021 Roberts Clark Independent Financial Solutions Limited. Registered in England No. 3981121. VAT No. 748 2866 87.

Registered Office: 1 Stret Constantine, Newquay, Cornwall TR7 1GH. Authorised and Regulated by the Financial Conduct Authority.