



Preference Questionnaire — United Nations Sustainable Development Goals



United Nations Sustainable Development Goals (the SDGs)

The SDGs are one way of expressing preferences and may be used alongside other approaches.

The 2030 Agenda for Sustainable Development was adopted by all United Nations Member States in 2015. The Agenda provides a blueprint, via 17 Sustainable Development Goals, for peace and prosperity for people and the planet, now and into the future.

The SDGs are a call to action by all developing and developed countries, via measures for economic development that maintain a balance with social and environmental needs. There are 169 underlying indicators. The SDGs provide a framework for investors.

Applying the SDGs to an investment process, or as a way to identify challenges to address, is growing in popularity. Some fund managers have developed funds which specifically use the SDGs as part of their investment strategy (inclusion of SDG-focused funds will depend on your Attitude to Risk/Capacity for Loss). Others apply the SDGs as an overlay or 'cross-check' as part of their wider ESG and Sustainable Finance strategy or theme. Both approaches are valid. Some funds may refer to the SDGs as part of their investment approach or reporting.

Further information on the Sustainable Development Goals: [United Nations SDGs](#).

This is an optional framework and does not need to be used. You do not need to complete all sections. Your adviser will help you focus on what is most relevant.

Understanding this questionnaire: This questionnaire is optional and is only used if you would like to express your investment preferences in more detail. You can choose to:

- keep your preferences simple and leave decisions to your adviser and the fund manager
- or provide more detail using this questionnaire

Your adviser will guide you through this and help you decide what is appropriate for you.

How your responses are used: Your responses help your adviser understand your preferences. They will be considered alongside:

- your financial goals
- your attitude to risk and capacity for loss
- your time horizon
- and your wider financial circumstances

Your adviser will recommend an investment approach that is suitable for you, which may involve balancing or adapting these preferences.

Important to know: Not all preferences can always be applied exactly as requested. There may be trade-offs between preferences, diversification and risk. Different investments take different approaches to sustainability and ethical considerations. Selecting specific themes or outcomes does not guarantee particular real-world results. Your adviser will explain what is possible and any limitations.

I confirm I have read the Investment Preference Pathway information and am ready to express my preferences in more detail.

UN Sustainable Development Goals - optional

NOTE: Selecting specific themes or goals does not guarantee that investments will achieve particular real-world outcomes. Different funds take different approaches, and your adviser will explain what is possible and any limitations.

I am interested in investments aligned to specific United Nations Sustainable Development Goals (these may involve more specialised or focused investment approaches, which your adviser will explain in the context of your overall risk profile)	Please tick:	Comment:
Environmental Factors ↕		
SDG 6: Ensure availability & sustainable management of water & sanitation for all		
SDG 14: Conserve & sustainably use the oceans, seas & marine resources for sustainable development		
SDG 15: Protect, restore & promote sustainable use of terrestrial ecosystems, sustainably manage forests, combat desertification, & halt & reverse land degradation & halt biodiversity loss		
SDG 13: Take urgent action to combat climate change & its impacts		
Social Factors ↕		
SDG 1: End poverty in all its forms everywhere		
SDG 2: End hunger, achieve food security & improved nutrition & promote sustainable agriculture		
SDG 3: Ensure healthy lives & promote well-being for all at all ages		
SDG 4: Ensure inclusive & equitable quality education & promote lifelong learning & opportunities for all		
SDG 5: Achieve gender equality & empower all women & girls		
SDG 7: Ensure access to affordable, reliable, sustainable & modern energy for all		
SDG 11: Make cities & human settlements inclusive, safe, resilient & sustainable		
SDG 16: Promote peaceful & inclusive societies for sustainable development, provide access to justice for all & build effective, accountable & inclusive institutions at all levels		
Governance Factors ↕		
SDG 8: Promote sustained, inclusive & sustainable economic growth, full & productive employment & decent work for all		
SDG 9: Build resilient infrastructure, promote inclusive & sustainable industrialisation & foster innovation		
SDG 10: Reduce inequality within & among countries		
SDG 12: Ensure sustainable consumption & production patterns		
SDG 17: Strengthen the means of implementation & revitalise the global partnership for sustainable development		

Any other comments:

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Client name:	Client signature:	Date: