

## Ethical Investing: Asking the Questions...



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**We are fast approaching the two year anniversary of the launch of our range of Ethical Investment portfolios, and one of the questions we are frequently asked is how to discuss the issue of ethical investing with clients.**

Last year we ran a series of articles discussing why as an adviser you would want to talk to your clients about this area and how to start the conversation.

- [Breaking down the barriers to ethical investing](#)
- [Ethical investing: starting the conversation](#)

Following on from this we have had a lot of requests for further guidance around the sort of questions advisers should be asking clients and in response we have developed a Client Questionnaire. The purpose of the questionnaire is to help advisers gain a better understanding of a client's views on key areas and

help the clients themselves prioritise what areas are important to them and if ethical investing is the right investment choice for them.

It is not always possible to find Ethical/Socially Responsible Investment funds to match everyone's personal preferences and the more areas of concern the client has and wishes to exclude the smaller the investment universe becomes. The key areas covered in the [Client Questionnaire](#) are those which are easily excluded whilst still allowing construction of a well-diversified portfolio.

If you have a client with areas of concern not mentioned please contact us and we will be happy to discuss further with you. [The Ethical, Environmental and Social Investments Client Questionnaire](#) only establishes a client's ethical requirements, it should be used in conjunction with your normal client fact find in order to determine appropriate risk levels and suitability.

Meanwhile, if you would like more information on the Whitechurch Prestige Ethical Portfolios please contact our [Business Development Team](#) at [dfm@whitechurch.co.uk](mailto:dfm@whitechurch.co.uk) or call 0117 916 6175.

**The Whitechurch Investment Team**

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