



Good Money Week - What Are We Doing for Sustainable Finance?

Good Money Week was started by the UK Sustainable Investment and Finance Association to help promote financial soundness whilst raising awareness of the benefits of sustainability and ethical investments & finance.

Whitechurch is passionate about the longevity of both our investments and the future of our planet. Ethical and sustainable decisions are at the heart of the business operations, not just for the investments we manage.

Our Sustainability Policies

Sustainability has been a hot topic over the last few years for a reason, yet to some, it may feel like the conversation rarely makes any progress. For every speech about what can be done to limit climate change, there's a rebuttal. Whenever a multinational company announces the changes they're making to reduce waste, there's a news article about another company that has been falsifying its green credentials.

Net-Zero Policy

Whitechurch recognises the need for every company to take steps to limit its impact on our environment. As a company, we support the ultimate goal of the Paris Agreement, to achieve net zero emissions by 2050.

At Whitechurch, we have made a number of commitments to reduce our corporate emissions, with the ultimate goal of achieving net-zero emissions on or before 2050. Our target of 2030 net-zero operational emissions aligns Whitechurch with the carbon neutrality goal of Bristol's 'One City' initiative.

More information regarding our net-zero policy can be found on our [website](#).

Responsible Investment Policy

Whitechurch Securities has also developed a Responsible Investment Policy to guide our approach to responsible investment. This policy has been adopted by the Board for

use by the company and will be reviewed (and where necessary, revised) on an annual basis.

It is our belief that the integration of ESG factors should be considered as part of the investment process. Our clients trust us to manage their capital – in return, we have a duty to fully evaluate the risk and opportunity associated with each investment we make on their behalf. We believe that ESG factors are an essential component of this process. We set out our responsible investment beliefs as follows:

» Integration of ESG can reduce risk and increase long-term financial returns.

» Climate change is a material risk for financial markets – investing in companies that are taking steps to manage this risk is an opportunity.

» Whitechurch has a responsibility to minimise where possible the negative impact of the investments we make.

» Where possible, we should seek to report to clients the impact (both positive and negative) of their investments.

While we believe that ESG integration is an important pillar of the investment process, we also understand that every client has their own individual preferences. Hence, we provide a wide variety of risk-rated investment strategies, with base-level ESG integration complemented with varying additional levels of sustainability-linked criteria. Our ethical and responsible dynamic strategies provide access to negatively screened portfolios across the capital and risk spectrum.

More of our Responsible Investment Policy can be found on our [website](#).

A Guide to Socially Responsible Investing

Sustainable investing isn't something that has to be left to the professionals. Anyone who wants to invest their money themselves can create a sustainable and ESG-focused portfolio.

If you would like to align your investment choices with your social and environmental values then Socially Responsible Investment (SRI) may be for you. Socially Responsible Investment is a term used to describe investments which take into consideration social and environmental factors as part of the investment decision-making process.

Whitechurch has created 'A Guide to Socially Responsible Investing' which gives insight into what needs to be considered for socially responsible investing. It helps you to understand what businesses may be doing and what investment managers look for when creating their ethical investments.

For information on Sustainable Investments, please visit our website www.whitechurch.co.uk or contact a member of our Client Services Team on:

Email: clientservices@whitechurch.co.uk

Phone: [0117 452 1208](tel:01174521208)

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Data Protection: Whitechurch may have received your personal data from a third party. If you invest through us, we may use your information together with other information for administration and to make money laundering checks. We may disclose your information to our service providers and agents for these purposes. We may keep your information for a reasonable period in order to manage your investment portfolios. We record telephone calls, to make sure we follow your instructions correctly and to improve our service to you through training of our staff. You have a right to ask for a copy of the information we hold about you and to correct any inaccuracies. When you give us information about another person you confirm that they have appointed you to act for them; that they consent to the processing of their personal data, including sensitive personal data and to the transfer of their information and to receive on their behalf any data protection notice.

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