## Worksheet 3 – Industry Insights – What to ask for when receiving financial advice

Here’s an example letter that you could use to ask for more information from your bank or financial advisor. Consider filling it in and seeing what response you receive from your bank.

[Your Name]

[Your Address]

[City, State, Zip Code]

[Email Address]

[Phone Number]

[Date]

[Bank or Financial Institution Name]

[Bank or Financial Institution Address]

[City, State, Zip Code]

Subject: Request for Information on Sustainable Investment Options

Dear [Name of Institution],

I hope this letter finds you well. My name is [Your Name], and I am a customer at [Bank or Financial Institution Name]. As an investor, I believe in the importance of sustainability and wish to align my investments with my personal values. I am writing to express my strong interest in sustainable investing and to request information regarding the environmental considerations of my current investments.

Given the growing global focus on environmental issues and the importance of responsible corporate practices, it has become increasingly crucial for me to ensure that my financial decisions contribute positively to a sustainable future. I understand that [Bank or Financial Institution Name] acknowledges the significance of sustainable investment strategies and is committed to providing options that support environmentally responsible initiatives.

I kindly request the following information:

1. An overview of the environmental and social considerations taken into account when managing the investment funds or portfolios I am currently invested in with [Bank or Financial Institution Name].

2. A breakdown of the specific companies and industries that my investments are supporting, along with any relevant environmental ratings or assessments for these entities.

3. Details about the sustainable investment options offered by [Bank or Financial Institution Name], including any environmentally conscious funds or impact-focused investment opportunities.

4. Information on how [Bank or Financial Institution Name] actively engages with companies to promote sustainability and ethical practices within their operations.

5. Any recent initiatives or achievements by [Bank or Financial Institution Name] in the field of sustainable finance and corporate social responsibility.

6. Guidance on how I can adjust my investment portfolio to align with sustainable principles and values, taking into account my financial goals and risk tolerance.

I believe that as customers and investors, we have the power to drive positive change by supporting companies and industries that prioritize sustainability. By offering transparent and accessible information on sustainable investment options, [Bank or Financial Institution Name] can empower its customers to make informed decisions that contribute to a more sustainable and responsible future.

Thank you for your attention to this matter. I look forward to receiving the requested information and appreciate any guidance you can provide in helping me align my investments with my sustainability preferences. If you have any questions or require further clarification, please do not hesitate to contact me at [Email Address] or [Phone Number].

Yours sincerely,

[Your Name]