



Sustainability meets Suitability



For sustainability to succeed. We must ensure suitability.  
To guide advisers and corporates.  
To create clarity for clients and employees.



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EnlightenESG's aim is to help people to understand what Sustainability in investing means to them. It is an open, accessible, and standardised suitability profiler that ensures a positive solution for all.

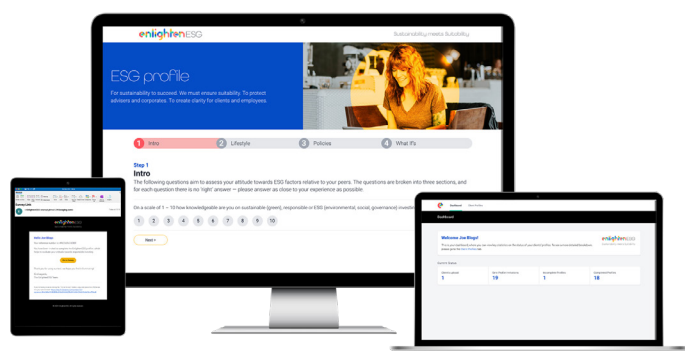
# About EnlightenESG

ESG, or Sustainable Investing is becoming a standard investment approach. Yet, to truly succeed, advisers, clients, corporations and employees must become enlightened to what ESG means to them.

## To enlighten advisers and their clients on ESG investing choices

EnlightenESG is an industry tool which has been built to address the gap that exists in the Sustainable fact-find. It helps Advisers guide their clients through a simple process, to understand and quantify the Sustainability of their lifestyle and to assess the potential implications behind their sustainable investment decisions. This ensures Sustainability and Suitability are interwoven throughout the entire advice process.

Without an effective profiling solution to assess clients' sustainability choices, clients may be left in the dark and advisers left uninformed. We identified a need for an open, accessible, and standardised suitability profiler that ensures a positive solution for all. So, that's what we created. In doing so, we make a small but meaningful contribution to the successful adoption of Sustainable investing.



## Why EnlightenESG?

The EnlightenESG tool helps to personalise the investment journey. We are done believing that the investment community always has in its heart a will to do what is right for each client, as opposed to sell its wares.

This is important, as instead of pushing product on people that simply want to invest for a better future, we try to understand exactly how each individual thinks about sustainability. Our view on these huge issues is deeply personal, so why can't our investments be?



# How it works

Using a series of questions, we map a unique profile to each user in our tool.

The tool can highlight how you express your Sustainable goals, whether you are interested in a particular area of sustainability or the potential risks associated with your decision making.

## What does ESG really mean to “me”?

EnlightenESG’s aim is to help people to understand what Sustainability in investing means to them.

We utilise a framework of questions that are designed to identify three areas of motivation to generate a personalised EnlightenESG score.

**Lifestyle:** Day-to-day, how do you incorporate Sustainability choices?

**Policies:** How do you feel about ‘big-picture’ Sustainability issues?

**What If’s:** How would you feel having undertaken a Sustainable investment versus a conventional one?



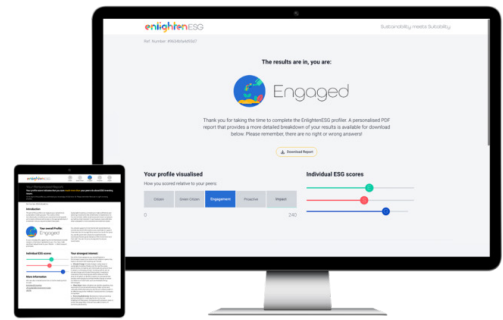
These questions and your answers help us to determine your Sustainability type, and this helps the adviser map you to a suitable investment.

The process is designed to learn and adapt as the world, and people’s views change. This use of big data will mean that over time the EnlightenESG profiler gets even smarter, and we can continuously improve our tool to provide more accurate results.

## What do you get?

Once you have completed the profiler – you receive a report that details your Sustainable investment profile.

We also have a series of informative articles in the Enlighten Insights section of our website that can help to educate and improve your decision-making around Sustainability. These pieces are designed to be interesting, educational, and free of bias.



## Key benefits for consumers

**Quantify:** We give you a profile score that represents your overall sensitivity to ESG-related issues.

**Relative:** Your scores are calculated on a relative, rather than absolute, basis so you can see how your ESG attitudes compare to those of their peers.

**Education:** Whether you consider yourself an expert or a beginner in the field of ESG, we hope to educate you on sustainable investing.



# For Advisers

Sustainability has made its way from the fringes of the Centralised Investment Proposition (CIP) to the top table. Despite a significant and developed history of risk profilers, there have been limited attempts to apply a systemic approach to understanding a client's perspective on ESG and integrating this into financial advice throughout the entire advice process.

## EnlightenESG was built with advisers for advisers.

When creating the profiler and designing the reporting outputs, we received input from advisers at each step of the process. From the layout and functionality of the client portal to the scoring rubric that produces clients' scores, EnlightenESG was built with advisers in mind.



## Key benefits for advisers

**Discussion Guide:** Acts as a framework for the ESG discussion and ensures that E, S, & G are given individual attention.

**Investment Selection:** Helps you to match your clients' investments with their attitudes towards ESG investing.

**Implications:** Allows you to assess how your clients feel about ESG-related trade-offs.

Book a demo



## If you're an adviser and would like to book a demo

Please contact [hello@enlightenesg.com](mailto:hello@enlightenesg.com)

Visit [www.enlightenesg.com/contact](http://www.enlightenesg.com/contact)

or scan the QR code





Enlightening clients on ESG investing choices.  
Protecting advisers with client suitability.  
EnlightenESG has been specifically developed  
to bring suitability to sustainability.





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