

# Client Guidelines on Socially Responsible Investments

Dear Valued Client,

We are pleased to provide you with our guidelines on socially responsible investments (SRI). These principles are designed to help you align your investment portfolio with your values while aiming to achieve financial returns.

## 1. Investment Philosophy

We believe that sustainable investments can positively impact society and the environment while delivering competitive financial performance.

## 2. Criteria for Selection

Our investment approach focuses on companies that demonstrate:

- Strong environmental practices
- Positive social impact
- Good governance principles

## 3. Exclusion List

We do not invest in companies involved in:

- Tobacco production
- Fossil fuels
- Child labor

## 4. Reporting and Accountability

We commit to providing you with regular updates on the performance and impact of your investments.

## 5. Client Involvement

Your opinions matter. We encourage you to communicate your values and priorities to ensure your investment strategy reflects your vision.

Thank you for choosing us as your investment partner. Together, we can work towards a more sustainable future.

Sincerely,

Your Investment Team