

Client Priorities for Ethical Investment Portfolios

Date: [Insert Date]

Client Name: [Insert Client Name]

Client Address: [Insert Client Address]

Dear [Client Name],

Thank you for choosing our firm for your ethical investment needs. We believe that investing ethically is not only beneficial for society but can also yield competitive returns. To customize your portfolio effectively, we would like to understand your priorities regarding ethical investing.

Please consider the following priorities:

- **Environmental Sustainability:** Prioritizing investments in companies that are dedicated to minimizing their ecological footprint.
- **Social Responsibility:** Focusing on organizations that promote fair labor practices and community engagement.
- **Corporate Governance:** Supporting transparent companies with ethical leadership and stakeholder engagement.
- **Impact Investing:** Seeking opportunities that generate positive social or environmental impacts alongside financial returns.
- **Exclusionary Criteria:** Avoiding investments in industries such as tobacco, firearms, or fossil fuels.

We would appreciate any additional thoughts or specific areas you would like us to consider in your investment strategy. Your feedback is crucial in aligning your portfolio with your values.

Thank you for your time, and we look forward to collaborating with you.

Sincerely,

[Your Name]

[Your Position]

[Company Name]

[Contact Information]