

Client Specifications for Ethical Fund Selection

Date: [Insert Date]

To: [Recipient's Name]

From: [Client's Name]

Subject: Specifications for Ethical Fund Selection

Dear [Recipient's Name],

I am writing to provide you with my specifications and preferences regarding the selection of ethical funds for my investment portfolio. It is important to me that my investments align with my values and commitment to sustainability and social responsibility.

1. Ethical Criteria

- Environmental sustainability (e.g., renewable energy, waste reduction)
- Social responsibility (e.g., fair labor practices, community impact)
- Corporate governance (e.g., transparency, ethical leadership)

2. Sectors of Interest

I am particularly interested in funds that focus on the following sectors:

- Renewable energy
- Sustainable agriculture
- Healthcare innovation

3. Exclusion Criteria

Please ensure that the selected funds avoid investments in:

- Fossil fuels
- Tobacco products
- Gambling and adult entertainment

4. Fund Performance

While ethical considerations are paramount, I also request that the selected funds have a proven track record of performance relative to industry benchmarks.

5. Reporting and Communication

I expect regular updates and transparent reporting on fund performance and any changes in ethical status.

Thank you for your attention to these specifications. I look forward to discussing potential investment options that align with my criteria.

Sincerely,

[Client's Name]

[Client's Contact Information]