

Investment Policy Statement

For ESG-Focused Investments

Date: [Insert Date]

Client Name: [Insert Client Name]

Address: [Insert Client Address]

1. Introduction

This Investment Policy Statement (IPS) outlines the investment goals, strategies, and guidelines for ESG-focused investments.

2. Investment Objectives

- To achieve long-term capital appreciation while adhering to ESG principles.
- To align investments with the client's values and sustainability goals.

3. Investment Strategies

Investment decisions will focus on companies and funds that prioritize environmental, social, and governance factors.

4. Risk Tolerance

The client has a moderate risk tolerance, understanding that ESG investments might have variable performance compared to traditional investments.

5. Asset Allocation

Proposed asset allocation includes:

- Equities: 60%
- Fixed Income: 30%
- Alternative Investments: 10%

6. Monitoring and Review

This IPS will be reviewed annually to ensure alignment with the client's evolving financial objectives and ESG criteria.

7. Signatures

[Client Name]
Date: _____

[Advisor Name]
Date: _____