



## ESG ACCORD

### ... ESG and Sustainable investing is changing our world. Are you ready?

**Sustainable investing has been called the ‘mega-trend of the decade’. Already it is changing client attitudes and requirements, and the regulatory and compliance framework.**

**For advisers, it will inevitably mean change, and also new opportunities.**

**ESG Accord is here to help advisers through the minefield of compliance and regulatory changes as they happen, and to enable you to provide an enhanced service to your clients.**



### Changes that will affect you

- The mandates and objectives of funds are changing
- PROD: you can't match a fund's target market without knowing full client preferences
- Disclosure changes to the Key Features Document
- You will have to adapt to the introduction of new Fund Labels
- Advisers need to broaden the questions they ask clients, to meet the evolving fund universe



### Change is an opportunity

**Increasing focus from Government, Regulators and clients on ESG and Sustainability issues create opportunities for financial advisers:**

- Better client engagement
- Intergenerational wealth transfer – advising the next generation on the road to 2050
- Pension sharing and divorce opportunities – new areas to discuss
- Exit planning – enhancing the sale price of your business
- Compliant files demonstrating suitable outcomes



### The role of ESG Accord

**At ESG Accord, we are specialists in assisting advisers to develop their ESG and Sustainable Finance processes, compliance policies and due diligence. Our groundbreaking Compliance Framework builds on existing FCA/ MIFID II rules and responds to developing regulations to deliver best practice for all advice firms.**

**This means that we are ideally positioned to:**

- Help you identify what you need to know
- Understand what your clients need to know
- Help you understand the new labelling system
- Ensure that your processes deliver the right outcomes for your clients
- Helping to identify and reduce greenwashing via our robust due diligence process



### Now get in touch

**Let's arrange a no obligation call, where you can find out more and ask your questions.**

**Click [here](#) to email Elly Dowding or [here](#) to connect with Elly on LinkedIn**

**Click [here](#) to email Lee Coates OBE or [here](#) to connect with Lee on LinkedIn**

**Click [here](#) for the ESG Accord website or [here](#) to follow ESG Accord on LinkedIn**

**Click [here](#) for our Compliance Guide to PROD and ESG & Sustainable Finance**

**... Your compliance, ESG & Sustainability, in accord**

