



ENVIRONMENTAL, SOCIAL, AND GOVERNANCE (ESG) SURVEY REPORT

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ATTITUDES TO ESG

We wanted to understand what King FP clients knew about investing in a different way. The financial services world constantly talks about ESG, but are our clients aware of it? Would it be something clients wanted to look into further for their investments?

The responders to our survey ranged in age from early 20s to early 80s. Thank you to all who took the time to respond, I found the results interesting and I must say, enlightening and pleasing:

1. 70% felt strongly about climate change and a company's environmental footprint
2. 90% have changed their thinking over the last couple of years
3. 40% were at least aware of ESG. 50% were not but thought it sounded interesting
4. 80% were at least willing to consider investing for a more positive impact
5. 56% would be interested even if it meant slightly higher cost or slightly lower returns

Overall, I feel that while my clients may not have appreciated their investment strategy could help promote ESG values, they are open to the concept and many positively welcome the difference it could make in the future.

To me, the ESG "theme" is more than just a development of "Ethical" or "Green". Many investment managers argue ESG as a strong investment case in itself. Put simply, if you were looking to identify a future winning business, it would need to be well run, environmentally responsible, respecting of its employees, customers and broader society, All the above are a good starting point.



QUESTION 1

Has the last couple of years seen you change your mind on your thinking regarding the environment and what can or cannot be done to change things?

49.1% Yes

41.8% A little bit

7.5% Not at all

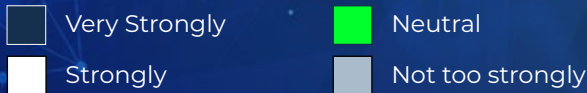
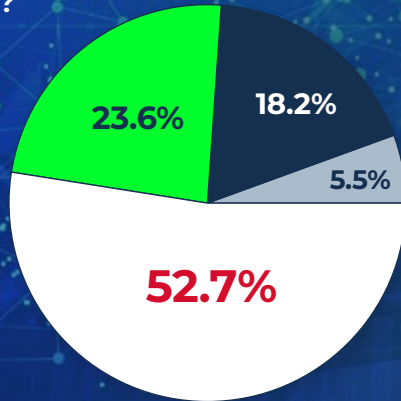
1.6% Have always supported climate change



QUESTION 2



How strongly do you feel about environmental factors such as climate change, and a company's environmental footprint and their activities?



QUESTION 3

Have you ever heard of the term ESG (Environment, Social Governance) as a way of investing money?

Yes : interested in the concept
10.9%

No : but sounds interesting
50.9%

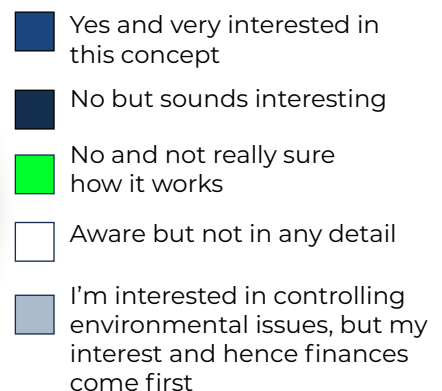
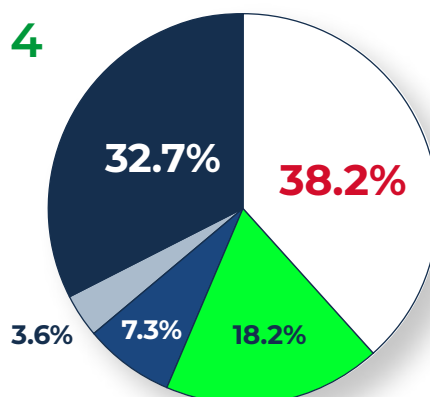
Aware : but not in any detail
29.1%

No and not really concerned
9.1%



QUESTION 4

Did you know that you could choose or exclude certain companies when investing for Social and Environmental reasons?

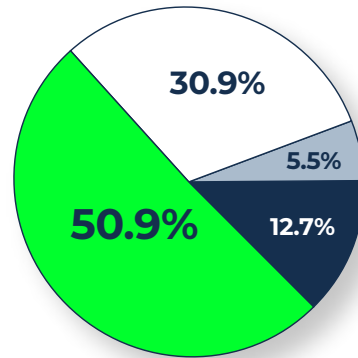




QUESTION 5

If you could invest your money to have a more positive impact on the world, would this be of interest?

- Maybe
- No opinion either way
- Yes and very interested in this concept
- Prefer to contribute in other ways



QUESTION 6

If the answer is yes or maybe, would you still be interested if that cost slightly more in Management charges and potentially a slightly lower return?

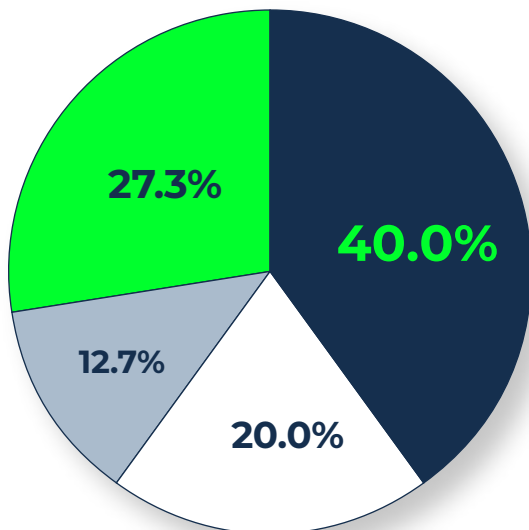
- 43.7% No
- 21.8% Yes to lower return
- 20% Yes to both
- 14.5% Yes to higher charges



QUESTION 7

Would you consider this for some or all of your investments?

- 42.9% Up to 25%
- 35.7% Up to 50%
- 14.3% All
- 7.1% Up to 75%



QUESTION 8

One problem is defining the various terms. What may be deemed as ethical by one person may not be ethical enough for someone else. How do you feel about this issue?

- I would want to see some general aims and objectives before making a commitment
- I am reasonably relaxed. Making a start is better than nothing
- I would want quite a lot of detail before agreeing to any investment in this
- I would want 100% assurance that the investment meets my specific standards



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