Tool 04

Suitability Mapping Framework

Advisor Cheat Sheet

ED4S

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PURPOSE To help advisors identify client motivations for sustainable investing and match them with suitable investment strategies that align with their goals, values, and preferences.

! This framework is intended as a guide to align client sustainability preferences with investment strategies. Investment approaches may combine multiple strategies and should always be assessed within the context of the client's goals, risk tolerance, and financial situation.

MAPPING FRAMEWORK

Motivation Type	What it Means	Client Mindset	Sustainability Strategy
Value Based	Seeks to avoid harm and align investments with personal or ethical values	"I don't want my money supporting fossil fuels or weapons."	Sustainability Strategy Use Exclusionary Screens; prioritize funds with clear ESG criteria (e.g., fossil-free, tobacco-free).
Opportunity-Driven	Sees sustainability as a megatrend with long-term upside potential	"Clean energy is the future; I want to be part of that growth."	ESG Integration and Thematic Funds (e.g., clean tech, water, electrification).
Purpose-Driven	Invests with the goal of generating measurable social or environmental impact	"I want to actively contribute to climate solutions or social equity."	Recommend Impact Funds or Active Ownership (engagement) enhanced investment strategies.

KEY TAKEAWAYS

- Client motivations should guide sustainable investing strategy selection.
- Many clients combine values, impact, and opportunity objectives.
- Consider risk tolerance alongside sustainability preferences and goals.
- Sustainable investing requires trade-offs, transparency, and ongoing dialogue.