

Sustainable Client Strategy Mapping | Advisor Cheat Sheet

Purpose

This mapping framework is designed to help financial advisors categorize clients based on their core motivations for sustainable investing. By understanding whether a client is primarily values-driven, impact-oriented, or focused on financial risk and opportunity, advisors can identify and recommend the most suitable sustainable investing strategy—or a combination of strategies—that align with the client's goals, preferences, and investment beliefs. This structured approach supports more personalized, effective, and transparent portfolio construction.

Important Note

The categorization below is intended as a simplified framework to support client understanding and alignment of sustainability preferences with investment strategies.

In practice, investment approaches may combine elements from multiple strategies, and suitability should always be assessed in the context of the client's overall goals, risk tolerance, and available 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."	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 enhanced investment strategies.