Tool
01

Sustainable Investing Integration Workflow

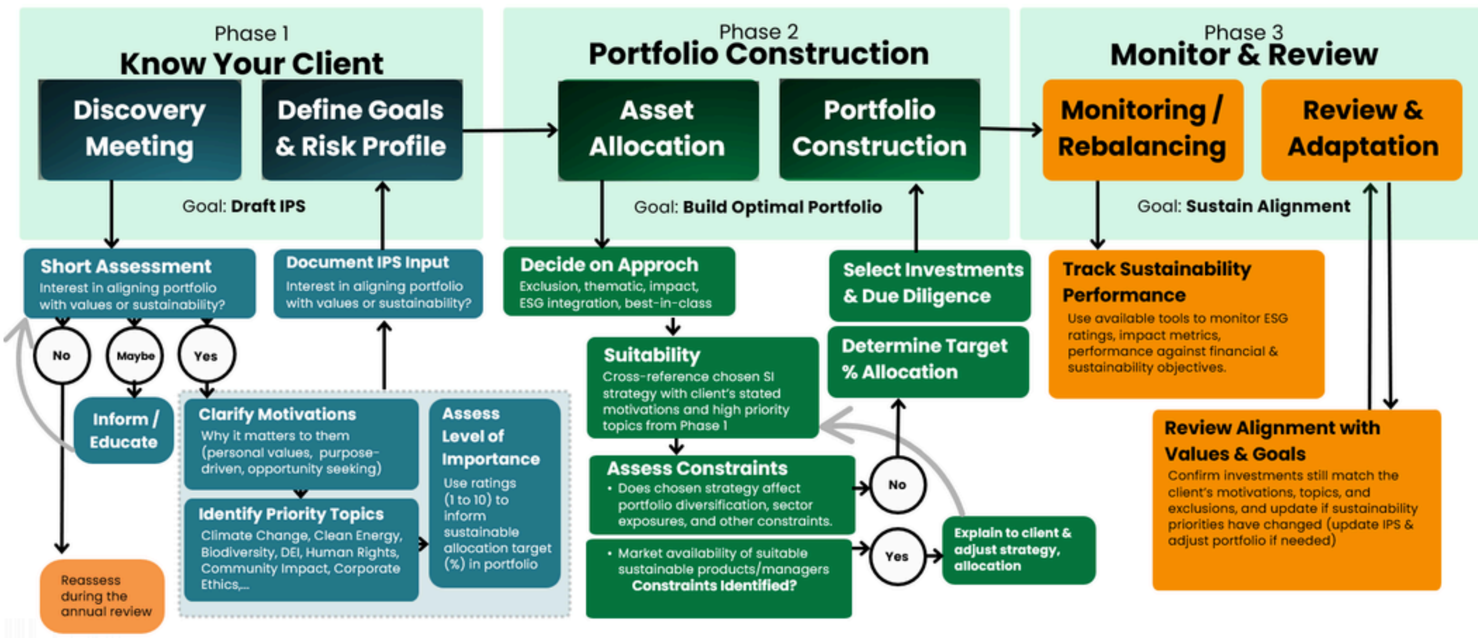
Advisor Cheat Sheet

ED4S

VERSION 1 | May 2026

PURPOSE

This tool provides a practical, step-by-step process to help advisors integrate sustainable investing preferences into their client portfolio across the advisory lifecycle.



Tradition Wealth Advising Process

Sustainable Investing: A Complement, Not a Substitute.
The entire wealth advising process remains governed by ethical, fiduciary, and legal obligations.
A sustainable investing overlay is added on top of these responsibilities—it does not replace them.

KEY TAKEAWAYS

- Understand the client's motivations and priority topics first.
- Choose the right sustainable investing approach for the client.
- Ensure suitability and manage portfolio constraints.
- Monitor performance and alignment, then review and adapt.
- Document decisions in the IPS and revisit regularly.