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# ESG Health Check

Your assessment and roadmap

# Reducing risk. Building value.

**Harness the full potential of ESG and impact opportunities by engaging our ESG Health Check.**

Fund managers, asset owners, corporate entities and family offices are prioritising ESG frameworks to protect their reputations and the performance of their investment portfolios.

Environmental, Social and Governance (ESG) standards consist of multiple financial, sector and regulatory metrics affecting the performance of investment portfolios. Investors are requiring more of fund managers as interest in sustainable impact investments has developed.

We can help.



# IQ-EQ ESG Health Check

## AN ESG roadmap in three steps

Fund managers, asset owners, family offices and corporate entities can progress their ESG journey with our three phase ESG Health Check.



### 1 ESG review

Understand your maturity level on the ESG spectrum.

During our review we:

- Assess your current level of ESG preparation
- Review your strategy, business objectives, sector and geographic focus
- Workshop your objectives and the direction of your ESG and impact journey
- Identify a set of actions to achieve your objectives
- Define value creation opportunities and how ESG can be used as a driver



### 2 Tailored assessment

During this phase, we consider lifecycle stages in life cycle and compare your business to peer groups, sectoral norms and selected benchmarks.

We assess:

- Your ability to communicate your ESG strategy
- How your investments align to your ESG strategy
- How you implement your ESG strategy and build value
- Ways to realise ESG value and link to financial returns
- How to leverage ESG to improve exit valuations and maximise value creation



### 3 Action roadmap

Our roadmap provides you with clear recommendations on how to:

- Achieve your ESG and impact objectives
- Communicate your ESG Impact Strategy to stakeholders
- Understand commercial, operational and regulatory opportunities
- Detail any threats that may impact portfolio performance
- Outline resources needed to meet your ESG and impact goals
- Schedule steps to achieve your objectives

# Driving performance. Protecting reputations.

## Who should have an ESG Health Check?

Those benefiting from our ESG Health Check include:

### **Fund managers**

Fund managers assessing their current ESG and impact progress and how best to communicate about ESG in a compelling way in advance of the next fund raise.

### **Asset owners**

Asset owners interested in the ESG credentials of their fund managers and investment portfolios.

### **Corporates**

Corporates looking to increase their brand value and market size while protecting their reputation.

### **Family offices**

Family offices that want to channel impact through to the underlying investments and want to understand what tools are available to help the process.



## About us\*

We are IQ-EQ, a leading investor services group employing over 4,000 people across 24 jurisdictions worldwide. We bring together that rare combination of global expertise with a deep understanding of the needs of our clients. We have the know how and the know you to support fund managers, global companies, family offices and private clients.

## Key contacts

If you would like to find out more about our ESG Health Check, simply contact one of our global team members below. They would be delighted to speak with you.

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\*Information correct as of 3 February 2022

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Reference: TSL309s\_09022022\_1  
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