

UKSIF is the membership network for sustainable and responsible financial services. We promote responsible investment and other forms of finance that support sustainable economic development, enhance quality of life and safeguard the environment. We also seek to ensure that individual and institutional investors can reflect their values in their investments.

## As an UKSIF member you access a range of highly regarded services and can participate in relevant projects. Selected member benefits:

- Participate in the UK-based network representing the broadest set of stakeholders in the sustainable finance sector.
- Receive regular, up-to-date information in "What's New", UKSIF's e-newsletter.
- Increase your network of contacts in sustainable finance, access the industry and public policy knowledge and experience of our members and staff.
- Join cooperative efforts to influence government and policy makers on behalf of responsible finance.
- Attend UKSIF's programme of events for your membership category such as our highly-regarded analyst and marketing seminars.
- Access high-level information and presentations, available only on the members' section of our website.
- Receive invitations to networking opportunities, such as our AGM and Annual Lecture, as well as to events organised by UKSIF members and our partners.
- Benefit from involvement in industry initiatives such as National Ethical Investment Week.
- Highlight your organisation's details in our membership directory available at [www.uksif.org](http://www.uksif.org).
- Use the UKSIF Member logo on your website and marketing materials.
- Expand business opportunities and profile through sponsorship of UKSIF resources and activities.

## Statement of Principles

By joining UKSIF, members subscribe to the following statement of principles:

- Members agree to support the work of and to disseminate information about UKSIF and the work of its members.
- Members commit to assist, either individually or with other UKSIF members, in improving the public's understanding of sustainable and responsible finance in supporting the theory and practice of sustainable and responsible finance.
- Members strive to act with a high degree of personal integrity, maintaining honourable relationships with colleagues, clients and all those who rely on the member's professional judgement and skills.
- Members seek continually to maintain and improve the knowledge, skills and competence relevant to their profession and be diligent in the performance of their occupational duties.
- Members make an affirmative commitment to apply honest, thorough and diligent methods of research and evaluation.
- Members should obey the laws and regulations relevant to their profession and should avoid any conduct or activity that would cause unjust harm to others.
- Members should use their membership in a manner consistent with the UKSIF Statement of Principles.

## Next Steps

- 1 Return your completed form to UKSIF, Holywell Centre, 1 Phipp Street London EC2A 4PS or via e-mail using the "Submit via Email" button on the top right corner of page 3. We will contact you to acknowledge receipt of your application.
- 2 Applications for membership must be approved by our Board of Directors. If your application is rejected by the board, we will refund your application fee in full.
- 3 Once your application is approved by the board, we will contact you again to confirm your organisation's details for the membership directory and provide log-in details to the members' section of the website. At this point, we will also ask you for the names of additional colleagues who would like to receive information from us regarding your member benefits.

## UKSIF Membership Categories and Fees

Membership fees are calculated according to an organisation's category and size. Please choose your category, and within that category, your organisation's size, from the options below.

If your organisation is eligible under more than one category, then the highest membership fee applies. Final approval of your membership category is a decision of the UKSIF Board of Directors.

Not sure which category you are in? Call us on +44(0)207 749 9950.

There is a separate form for [financial advisers](#), [associate members](#) and [individual supporters](#). Please ensure that you fill out the correct form.

## Categories of Membership

### Group Category:

Financial Service groups with multiple brands and/or functions. Group membership allows the businesses and brands to be listed separately as UKSIF members.

- **Fee by negotiation:** (£11,500 minimum)

### Category One: Banks/Investment Managers

Investment Managers, Investment Banks, Banks and Building Societies and other providers of investment management, investment banking and other banking services.

- **Funds over £5bn:** £5,750+vat (£6,900)
- **Funds over £1bn:** £3,450+vat (£4,140)
- **Funds over £0.25bn:** £1,725+vat (£2,070)
- **Funds over 0.1 bn:** £990+vat (£1,188)
- **Other:** £500+vat (£600)

### Category Two: Professionals

Financial Advisers, Consultants, Research Providers and other Providers of related Products and Professional Services (unless covered in Category 1).

- **Full time staff (or equivalent) of more than 50:** £1,725+vat (£2,070)
- **Full time staff of 20-49:** £862+vat (£1,034.40)
- **Full time staff of 10-19:** £460+vat (£552)
- **Full time staff of 2-9:** £230+vat (£276)
- **Sole Trader/Registered Individual:** £115+vat (£138)

### Category Three: Pensions Funds, Charities and Others

Pensions Funds, Foundations, Charities and NGOs, Trade Unions, Private Individuals and others (where not selling financial products or services, or related products or services).

- **Assets more than £0.5bn:** £990+vat (£1,188)
- **Assets more than £50m:** £345+vat (£414)
- **Other:** £115+vat (£138)

### Associate Member

For significant asset owners e.g. Pension Funds and Charitable Foundations (where not selling products or services or managing their own funds).

Associate Members are not UKSIF members and do not participate in UKSIF governance.

Associate Members are able to access selected UKSIF Member Services only and are required to confirm annually that they are eligible to retain Associate Member status.

- **Associate Member:** No Fee

### Individual Supporter

For individuals interested in UKSIF and its activities, but who are not pursuing a professional interest. Supporters are not UKSIF members and do not participate in UKSIF governance.

- **Individual Supporter:** £45+vat (£54)

[Submit by email](#)
[Print Form](#)

### Affiliation

For organisations that would like to benefit from UKSIF's services, but that do not wish to subscribe to UKSIF's objectives and principles, UKSIF offers affiliate status. Affiliate fees are equal to membership fees. Affiliates are not eligible to participate in the governance of UKSIF and may not use the UKSIF logo.

We are applying for affiliate status.

### Unregulated investments

Organisations promoting unregulated investments will be requested by UKSIF to provide additional information.

We promote unregulated investments.

### Organisation

Name

Address

City/Town

Post Code

Website

Briefly describe your organisation's purpose and interest in sustainable and responsible financial services

### Main Contact(s)

UKSIF will contact the following people via e-mail regarding your organisation's member benefits and involvement in UKSIF governance, e.g. voting forms for our AGM. Please provide at least one contact. You will have the opportunity to provide additional contact details to receive member benefits after your membership is approved.

Name (1)

Job Title

E-mail Address

Telephone

Name (2)

Job Title

E-mail Address

Telephone

### For applicants outside the UK

If you have offices inside and outside the UK, which office is most directly connected with receiving UKSIF services?

- Inside the UK  
 Outside the UK

If you are applying from the EU please provide your organisation's VAT registration number.

VAT Registration Number:

### Declaration

We apply for UKSIF membership and agree to bound by the Memorandum and Articles of Association of UKSIF (unless applying for affiliation).

We declare that we have read the membership category information on page 2 of this form and have selected the correct membership category and fee.

Name

Signature

  


### Method of Payment

**Cheque enclosed**  
 Please make cheques payable to:  
 UK SUSTAINABLE INVESTMENT AND FINANCE

**Invoice me the appropriate fee**

### Data Protection

UKSIF will send e-mail communications to the contact addresses you provide. We sometimes share contact details with selected partners so that they may send you invitations for relevant events and other information that we believe might be useful.

By signing this form you are consenting to this on behalf of your colleagues unless you tick the following box. If you DO NOT wish UKSIF to disclose your details, please tick here:

You may change your consent at any time by contacting [info@uksif.org](mailto:info@uksif.org).

Return your completed form to UKSIF, Holywell Centre, 1 Phipp St, London EC2A4PS.

**Any questions? Call us on +44 (0) 207749 9950, or email us at [info@uksif.org](mailto:info@uksif.org).**

You can also fill in this PDF form and email it to us using the "Submit by Email" at the top of this form.