



UK Social Investment Forum

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[latest](#) [site-map](#) [search](#) [help](#) [contact](#) [home](#)

UKSIF Press Release: November 23, 2004

UKSIF Launches Toolkit to Help More Financial Advisers Offer Ethical and Socially Responsible Investment Advice

Today the UK Social Investment Forum (UKSIF) launches a new information pack - *'Investing Responsibly: A Practical Toolkit for Financial Advisers'* - which aims to make it easier for advisers to offer ethical and socially responsible investment advice.



The Toolkit seeks to close the gap between the 65%* of people who say IFAs should ask clients whether or not they are interested in investing ethically and the current low levels of advice offered which is reflected in SRI funds under management being only in the region of 1% of assets invested in the UK.

The Toolkit contains an example SRI fact-finding process, two supplementary fact-find questionnaires for use alongside standard fact-finds (one of which is compatible with Synaptic Systems' Fund Manager), and details of where to go for further information. An introductory letter from Paul Smee, Director General of AIFA (the Association of IFAs) is also included. [\(See below to download all of these documents.\)](#)

Julia Dreblow, SRI Manager at Friends Provident and Director and Chair of the UKSIF retail sub-committee which helped steer the creation of the Toolkit said:

"It is wonderful to have had a number of the leading providers of ethical funds and other socially responsible investment products - together with leading specialist IFAs - to create the Toolkit. We have worked hard to develop something that will help IFAs to start offering responsible investment options - which we believe so many of their clients would really like to hear about."

She continued:

"We recognise that competition between different product providers and fund managers has not always made it easy for advisers to understand this market and hope that the Toolkit will start to set this straight and clear some of the fog away."

about UKSIF
UKSIF programmes
UKSIF events
UKSIF newsletter
UKSIF member directory
UKSIF library & archive
home

The Toolkit was sponsored by Friends Provident, CIS, Jupiter and Morley and supported by the EIA (the Ethical Investment Association) an association of ethical specialist IFAs, who, alongside research provider EIRiS and other sub-committee members, consulted with IFAs to work out how best to help them to start offering ethical investment advice to their clients.

It is intended that the Toolkit will be expanded over time. For example, a more detailed technical guide will follow later this year and a programme of IFA seminars will run during 2005.

Toolkit sponsors:



Commenting on the launch, Paul Smee said:

"Socially responsible investment offers IFAs a great opportunity to show their professionalism and the value they offer their clients. Ethical or socially responsible business can not only help IFAs to demonstrate in yet another way the value of getting proper professional advice, but it can also help them to show an even higher level of attention to clients' needs."

Specialist IFA, and former Chair of UKSIF, Amanda Davidson, Financial Planning Director at John Scott and Partners (which incorporates Holden Meehan) said:

"We are delighted to see the launch of the toolkit. For those advisers not sure where to start this will help them develop their knowledge of SRI. For those already involved with SRI it will enhance knowledge. We know from our discussions with clients that they are interested to learn more about SRI. They seek advisers who can demonstrate an understanding of this fascinating subject."

* Researched by MORI in 2004/Friends Provident 10 - 15 June 2004

ENDS

Downloads:

 [Investing Responsibly: A Practical Toolkit for Financial Advisers](#) [PDF, 59kb]

 [Personal Fact Find \(provided by Lee Coates\)](#) [PDF, 30kb]

 [Personal Fact Find \(compatible with Synaptic Systems Software\)](#) [PDF, 24kb]



[Letter of recommendation from Paul Smee, Director General, AIFA](#) [PDF, 88kb]

* NOTE: further documents will be added in due course *
Please check the [UKSIF Library under 'consumer sri'](#) for updates!

For further information:

For further information and details of forthcoming Technical Guide and IFA Seminars, please see

[UKSIF Library: by subject: Retail/Consumer SRI](#)

or contact:

- Julia Dreblow (UKSIF Retail Sub-committee Chair and SRI Manager, Friends Provident Life and Pensions Ltd) - julia.dreblow@friendsprovident.co.uk.

Other contacts:

- Helen Wildsmith (Executive Director UKSIF) - see [Contact UKSIF](#).
- Jeff Watt (Bell Pottinger Corporate & Financial)

Notes to Editors:

About UK Social Investment Forum:

The UK Social Investment Forum (UKSIF) is the UK's membership network for [socially responsible investment \(SRI\)](#). UKSIF's primary purpose is to promote and encourage the development and positive impact of SRI amongst UK based investors. UKSIF believes that all material social, environmental and ethical (SEE) issues should be integrated into standard investment practice and that individual investors should be able to reflect their values in their investments.

The Forum was launched in 1991 to bring together the different strands of SRI nationally and to act as a focus and a voice for the industry. UKSIF's 250+ members and affiliates include retail and institutional fund managers, financial advisers, SRI research providers, consultants, trade unions, banks, building societies, community development finance institutions, NGOs and individuals interested in SRI.

In addition to [UKSIF's programmes](#) and [parliamentary work](#), the Forum prepares [member newsletters](#) and [briefings](#), as well as co-ordinating a wide range of [events](#), from small seminars to conferences on topics reflecting the full spectrum of interest in the SRI field. UKSIF also works to educate the public and Government about SRI.

For further information see [About UKSIF](#) or [contact UKSIF](#).

See also:

[InvestAbility website: www.investability.org](http://www.investability.org)

▶ UKSIF library ▶ type ▶
▶ UKSIF library ▶ subject ▶

[latest additions](#) [date index](#) [site search](#)

[▲](#)
top

[about](#) [programmes](#) [events](#) [newsletter](#) [directory](#) [library](#) [login](#)
[latest](#) [site-map](#) [search](#) [help](#) [contact](#) [home](#)



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