



November 2004

Dear Colleague,

I am writing to commend to you this excellent initiative by UKSIF. At a time of great change in our sector, I think that advisers have a great opportunity to show their professionalism and the value they offer their clients by taking an interest in socially responsible investment.

I believe that ethical, or socially responsible business can not only help you to demonstrate in yet another way the value of getting proper professional advice, but it can also help you to show a level of attention to your clients' needs. In the new menu driven world it can help you to justify either the fees or the commissions that you receive, and help you to get to know your clients better than ever before. This in turn should give you an added X-Factor to contribute towards future business success.

You may have been put off involvement in this area because it has been difficult to know where to go for impartial information in this growing area. This pack put together by UKSIF, whose members include product providers, IFAs, research companies and others, is a serious attempt to help non-specialist IFAs to start to offer advice on ethical investment.

I commend this Toolkit to you as a step in the right direction and an excellent way of coming to terms with this subject.

Yours faithfully



Paul Smee  
Director General  
Association of Independent Financial Advisers