For Professional Intermediaries Only

Sustainable Portfolio Service

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PK Wealth's sustainable solution is a suite of five globally diversified, risk-rated actively managed portfolios. Underlying funds have a focus on sustainable investing. It must be incumbent upon all businesses to adopt an all-encompassing approach to the environment, society, and show that through good corporate governance.

Spotlight on Sustainable Investing

Three different sustainable investment strategies are integrated into PK Wealth's research process:

- **Environmental, Social & Governance (ESG)**
  Reviewing company ESG policy and practices that may impact investment performance
- **Socially Responsible Investing (SRI)**
  Removing/selecting investments based on specific ethical guidelines
- **Impact investing**
  Investing in companies that aim to make a positive impact to benefit society

Sustainable Portfolio Service Summary

- Active discretionary management with fund selection focused on ESG, SRI and Impact factors
- Proprietary screening process uses a scoring system to select only the highest scoring investment products for inclusion in client portfolios
- Five risk profiles investing in global diversified multi-asset investments
- Minimum investment: £50,000
- Annual management fee of up to 0.5% + VAT, plus custody and underlying charges

Sustainable Portfolio Service Benefits

- Robust due diligence and investment process combines proprietary research with external specialist sustainable investing data providers.
- Clear and transparent reporting including quarterly portfolio valuations

Meet the managers

Graham Frost
Chief Investment Officer

Graham heads up the asset allocation and investment research process. He is an industry commentator and has over 30 years of experience.

Michael Usher
Investment Director

Michael has extensive investment experience and is involved in the asset allocation and portfolio construction process. He joined PK Group in 2016.

Background to PK Wealth

- PK Wealth is part of PK Group, a financial and professional services firm founded in 2003
- Headquartered in Richmond, PK Group provides investment management, accountancy, tax planning, financial planning & employee benefits services