

# At a Glance Guide to Ogier Global Sustainable Investment Consulting

Sustainable Investment (SI) Consulting is a dedicated advisory offering bespoke portfolio design, integration, management and reporting solutions to alternative asset managers, private wealth and institutional investors helping to navigate sustainable investment goals and to leverage the landscape of opportunities

## 5 things to know about Sustainable Investment Consulting services



**ESG regulation advisory:** We review sustainable investment strategies and external and internal sustainable risk, ESG and remuneration policies to provide a gap assessment against regulatory frameworks, we align objectives with desired portfolio expectations, review portfolio ESG risks, and conduct annual relevance, materiality and scenario analysis testing



**Portfolio management:** We identify appropriate SI and/or impact objectives, deliver implementation plans and oversight structures, and support risk committees and boards to monitor and manage material ESG issues



**Training:** We offer training to relevant teams and portfolio companies on frameworks such as TCFD, TNFD, IFC performance standards, UN PRI, UN SDG, UN GCP, and provide an online climate-risk training tool, ESG Align, to help managers understand, interpret and act on ESG risks



**Implementation:** We provide implementation remediation, independent verification, conduct materiality mappings of ESG risks, assist with the development of ESG ratings and assessment tools, develop due diligence processes, and offer regular monitoring and reporting



**Investor readiness and reporting:** We conduct gap analysis to review investors' DDQ against existing ESG processes, and perform regular health checks for SI requirements against those from investors, LPs or regulators



**Diverse experience:** We work across the spectrum of asset classes including alternative asset managers (multi strategy asset managers, private equity funds, private debt, venture funds, hedge funds), private wealth clients (foundations, family offices, trusts, private banks), and institutional investors, including banks



**Global Knowledge:** We provide clients with a tailored service to match their needs across all regions



**Flexible approach:** We provide clients with a tailored service to match their needs and work closely with ESG and SI experts from Ogier's legal teams



**Diverse talent:** Our team draws on a wealth of ESG and SI experience to offer practical solutions that support managers to move beyond compliance towards implementation of sustainable investment into portfolios



**Aligning culture and governance:** We work across departments from legal, compliance to portfolio managers to ensure that sustainable investment becomes an integral part of corporate strategy and culture



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