

Quick Start Guide to the ESG Advisor Tool Kit

New investor research shows strong interest in environmental, social and governance (ESG) investing:

56%

would ask their advisor about ESG options in the next year or so.

78%

are already investing in ESG strategies or are very receptive to it.

72%

agree that companies can have a positive impact and make a profit.



Use the ESG Advisor Tool Kit to deepen client relationships in three steps.

STEP

1

Start today.

Don't wait for the annual review. Identify clients you're meeting with in the next month who are most likely to want guidance on ESG investing:

- They have some ESG investments or have expressed an interest in ESG.
- Or, research shows that they're most likely to be interested in ESG:
Ages 30–50 | \$1M+ investable assets | Women

POWER TIP: Think outside the ESG box. Not all clients look like their ESG demographic segment. Consider clients who are looking for ways to engage adult children with money management or have asked about donating to a favorite cause or simply like to follow the investment headlines. ESG offers a great opportunity to initiate or extend other conversations.



STEP

2 Engage clients.

Email the clients you identified and invite them to take BMO's new ESG digital quiz:

- First, discover your own ESG investor personality by taking the quiz on BMO's new MyESG™ digital quiz, and see what your clients will see. [Click here for the quiz.](#)
- Walk your clients through the quiz at your next meeting.

POWER TIP: Email your clients to take the quiz and share their results before your meeting. For example:



“Hi Anne, looking forward to our meeting next week. Let’s add one more thing to our agenda — it’s a new interactive tool to see if responsible investing makes sense for your portfolio. I took the quiz last week. It’s pretty neat, it’s fast, and I was surprised at my results. Take a minute to answer the quiz online, so we can discuss your results. [Click here to start](#) and remember to email the results to me before our meeting so we can discuss.”

STEP

3

Talk about the results.

Take a client-centric approach and be proactive in starting the conversation.

Read about the four ESG investor personalities, and how to tailor your clients conversations based on the quiz results, in the [ESG Conversation Starters](#).



ESG Motivated: "It makes sense to me, it's a part of my daily life and my investing mindset."



ESG Ready: "ESG issues are important to me, I'd like to know more about how to invest."



ESG Pragmatic: "I'm just not sure; will it work with my investment goals?"



ESG Skeptical: "Prove it — show me that this is about performance, not just values."

POWER TIP: Move beyond the outdated notion that ESG is a binary decision — that clients are/are not ESG investors, and that motivation is either values based or performance based. Don't always lead with the "E" in conversations with clients; ESG is about more than climate change and has the potential to reduce risk and add returns over the long term.



Responsible about investment

At BMO we invest with a purpose – to boldly grow the good. Our focus is simple: to help our clients meet their investment goals, while also building a more sustainable and secure future for us all.

It is an ethos we are proud of and one that is engrained in our heritage. Our first responsible fund launched over 35 years ago and our teams have been actively engaging with companies to drive improvements in relation to their environmental, social and governance (ESG) practices for over two decades.

Expertise	Dedicated Responsible Investment Team with 20 investment specialists around the globe.
Track record	35 years of responsible investing experience.
Breadth	Market-leading range of ESG stock, bond and balanced funds, across active and index solutions.
Engagement	Extensive global engagement and voting program.

Questions?

Contact your BMO GAM representative, or download your ESG tool kit today from www.bmogam.com/esgleaders.

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