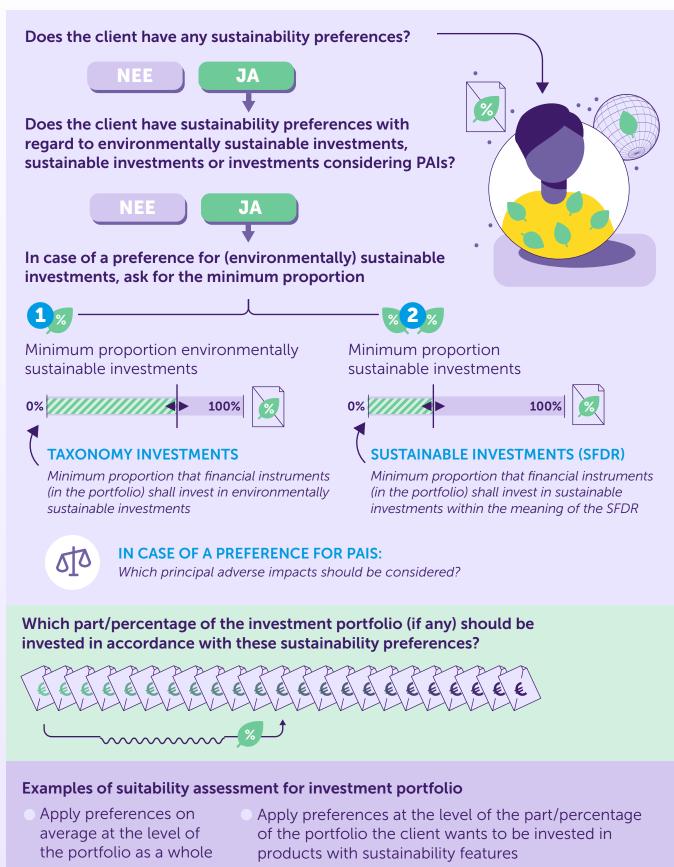# Collecting information on sustainability preferences: how it works

A

Does the client have any sustainability preferences?

NEE **JA**

Does the client have sustainability preferences with regard to environmentally sustainable investments, sustainable investments or investments considering PAIs?

NEE **JA**

In case of a preference for (environmentally) sustainable investments, ask for the minimum proportion

1 % %**2**%

Minimum proportion environmentally sustainable investments

0% 100%

TAXONOMY INVESTMENTS
Minimum proportion that financial instruments (in the portfolio) shall invest in environmentally sustainable investments

Minimum proportion sustainable investments

0% 100%

SUSTAINABLE INVESTMENTS (SFDR)
Minimum proportion that financial instruments (in the portfolio) shall invest in sustainable investments within the meaning of the SFDR

IN CASE OF A PREFERENCE FOR PAIS:
Which principal adverse impacts should be considered?

B

Which part/percentage of the investment portfolio (if any) should be invested in accordance with these sustainability preferences?

C

Examples of suitability assessment for investment portfolio

Apply preferences on average at the level of the portfolio as a whole

Apply preferences at the level of the part/percentage of the portfolio the client wants to be invested in products with sustainability features

AFM