

Our Environmental, Social and Governance Statement

BCWM has incorporated the consideration of sustainability (environmental, social and governance (“ESG”) risks and how such risks may impact on client portfolios, in the development of its investment advisory process. The Firm’s ethos on wealth preservation and clients’ desires to generate sustainable long-term returns requires the investment process to have regard to and manage where possible adverse impacts on sustainability factors which may have an impact on client portfolios.

Responsible Investment

BCWM considers ESG factors to satisfy our clients’ principles as well as their financial needs.

We consider the impact on health, safety, society and the environment in our investment selection. It is our view that over time, this ESG strategy can generate long-term competitive financial returns.

It is the BCWM’s policy to maintain remuneration arrangements that, among other things, do not encourage risk-taking (including in respect of exposure to Sustainability Risk as defined in the SFDR) that is inconsistent with its risk profile.

This policy is kept under content review and any marketing material updated to reflect relevant changes.

June 2022