

Background Information and Communication Pack for Introductory Video on Sustainable Investments

In this document we explain the objective of the video, provide guidance regarding its use and offer concrete texts for your communication on the video.

Objective of the video

Investors are increasingly taking sustainability criteria into consideration when making their investment decisions. However, sustainable investments are a complex topic and not all clients are equally aware of the different forms and objectives of sustainable investment products. The approaches currently adopted in the marketplace pursue different goals – from implementing the client’s personal values, to minimising risk or making a positive and concrete impact. In many cases sustainable investment solutions are being wrongly interpreted, or even completely misunderstood. Such gaps in investors’ knowledge can lead to misunderstandings and – in consequence – to greenwashing allegations.

With this new introductory video on the different objectives of sustainable investments, SSF intends to give banks and financial advisors a useful tool at hand that helps them inform their clients about sustainable investing. The short video uses clear language to explain the most important objectives and forms of sustainable investment, laying the foundation for more informed discussions with investment advisors. It can be used independent of a banks sustainability approach, as it explains mechanisms and objectives in a generic way. If clients have a better understanding of the different approaches and their motivations, it will become easier for client advisors to gain a better understanding of their clients’ motivations.

Form of the video

The SSF introductory video “Why should you consider sustainability criteria in your investments?” lasts two minutes and is available in four languages. It was produced with the support of an SSF working group comprising representatives from wealth management and retail banking.

Access the video here:

- [English](#)
- [German](#)
- [French](#)
- [Italian](#)

Content of video

The video contains the following main messages:

- Our current world is shifting towards more sustainable options for consumers. This is also relevant for investment decisions.
- There are three key objectives why sustainability factors are integrated in an investment process
 - The risk-return profile of a portfolio can be improved by investing in companies with exemplary environmental and social practices. Such companies can have lower risk exposure and can benefit from investments in forward-looking companies.
 - Investments can be aligned with certain personal values. Companies that do not align can be excluded from an investment portfolio and investments can be focused on topics that are close to a clients heart.
 - Banks can support positive change on behalf of their clients by exercising voting rights and engaging in a dialogue with companies to change behaviour. The more individual investors require their bank to do so, the greater the collective influence can be.

The key takeaway from the video is: Not each sustainable investment product fulfils each objective, instead the client has to make a choice regarding the main goal. To learn more, clients should discuss with a client advisor and ask questions.

Ways to use the video

This video was prepared by SSF for banks and financial advisors to use in their communication to clients, particularly to help contextualise questions regarding client sustainability preferences. Against the recent regulatory developments in Switzerland and in the EU, it is key for banks to better understand the preferences of their clients regarding sustainable investments. The video will help them to start a discussion with their clients about their individual preferences and the importance of the different goals.

The video is suitable for direct use in client advisory sessions, but also for general client information in newsletters or on the website. Furthermore, it can be integrated into client advisor training sessions.

Use in client communication:

- Use it in client conversation: provide basis for clients' understanding when determining client sustainability preferences and provide a context for clients to raise the right questions
- Integrate it into client advisory software
- Include it in client newsletter
- Social media communication
- Website: integrate it in investment section or in sustainable investment section

Use in training of client advisors or other employees:

- Use it as teaching material for client advisors
- Integrate it into introduction modules for new employees
- Promote it on intranet

Communication Suggestions

We recommend to our members to actively inform their clients about the video via different communication channels. Find below some concrete messages for your social media channels:

Please use the following hashtag when posting about these videos on your social media channels:
#ssfvideoforclients22

Suggestions for Twitter:

Tweet 1:

Watch the new introductory video on sustainable investing created by SSF for clients who are unsure if #sustainableinvestment is for them. Link here: INSERT LINK #ssfvideoforclients22



Tweet 2:

Sustainable investments can improve the risk-return-profile of a portfolio, can align with personal values and can support positive change. Watch the video here: [INSERT LINK](#)
[#ssfvideoforclients22](#)



Suggestions for LinkedIn:

LinkedIn post 1:

Banks can support positive change on behalf of their clients by engaging in a dialogue with companies to change behaviour. This is one of three key reasons why [#sustainableinvestments](#) are something for everyone. Watch the new video by SSF to find out more: [INSERT LINK](#)
[#ssfvideoforclients22](#)



LinkedIn post 2:

Unsure if sustainable investments are for you? Watch the new video by SSF to help you discover whether you have sustainability preferences for your investments. Link here: [INSERT LINK](#)
[#ssfvideoforclients22](#)



Do not hesitate to reach out to us in case of any questions on the use of the introductory video:
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