The Inaugural Wealth for Good Awards 2022 categories

The Wealth for Good Awards 2022 categories have been organised per type of industry as shown in the table of contents below.

On the registration form, the entrants will be asked to select the geography/geographies in which they operate and type of business before choosing the award categories they would like to enter.

When collating their submission, the entrants need to refer to this document to fulfil the category award criteria.

Contents

Private banks – per region (Americas, UK, Europe, Switzerland, MENA, APAC) .................. 2
Private Asset Managers – per region (UK, Europe, MENA) (RIAs in US and EAMs in Switzerland and APAC)......................................................................................................................... 3
Fund/asset managers – per region (Americas, UK, Europe, Switzerland, APAC)................. 5
Family Offices (Americas, UK, Switzerland, Europe, MENA, APAC).............................. 6
Trust companies – per region (Americas, UK, Switzerland, Europe, MENA, APAC) .......... 7
Law firms – per region (Americas, UK, Switzerland, Europe, MENA, APAC) ................. 9
Tech firms (Americas, UK, Switzerland, Europe, MENA, APAC)....................................... 10
Wealth Management Consultants (Americas, UK, Switzerland, Europe, MENA, APAC)..... 11
Private banks – per region (Americas, UK, Europe, Switzerland, MENA, APAC)

Judges will be looking for clear evidence of how ESG, Impact, Diversity and Inclusion initiatives, programmes and offerings are differentiated from other “mainstream” products and services offered by the banks. They will take note of how these offerings, services and products conform to the established relevant definitions in each category and also how effectively they have been implemented throughout the bank and accepted and appreciated by clients.

Please include the following components in your submission:

➢ Testimonials from clients and other interested parties;
➢ A clear statement of what each service line is attempting to achieve
➢ Metrics used by the bank to assess how well it has lived up to its own expectations, including explanations of methodologies used.
➢ Real life examples and the extent to which banks entering each category have used the service line in question to influence the overall culture of the bank in regard to ESG, sustainability and impact.

In the thought leadership category judges will be looking for material and activity that adds to understanding and appreciation of this area amongst clients, the industry and/or the general public and could be in any format appropriate to the audience.

The research category applies to published material on specific topics, companies, sectors or investments that are specific to this sector.

The communication strategy category applies to internal and/or external communication and also includes a review of how the strategy has been implemented.

The diversity and inclusion category will be judged on the widest criteria of these terms and will not only look at the way that statutory obligations are met but also how personal differentiators such as education, class, career stage and professional backgrounds are brought into the fold of a diverse and inclusive talent pool.

In the CSR category judges will be looking for examples of the bank initiating community activities for employees to engage with and also implementing schemes that have been brought forward by employees for consideration. The ways in which CSR activities can blend with work activities is an important part of this process. Specific examples and positive outcomes will be very much appreciated by the judges.
Categories:

Best bank for sustainability & ESG thought leadership
Best bank for ESG research
Best bank for ESG portfolio (methodology)
Best bank for ESG portfolio (performance)
Best bank sustainability offering (investments)
Best bank SRI offering
Best bank impact offering
Best bank philanthropy offering
Best bank philanthropy initiative
Best bank NextGen ESG initiative or offering
Best bank ESG communication strategy
Best bank diversity and inclusion programme
Best bank CSR staff programme

Private Asset Managers – per region (UK, Europe, MENA) (RIAs in US and EAMs in Switzerland and APAC)

Judges will be looking for clear evidence of how ESG, Impact, Diversity and Inclusion initiatives, programmes and offerings are differentiated from other “mainstream” products and services offered by the manager. They will take note of how these offerings, services and products conform to the established relevant definitions in each category and also how effectively they have been implemented throughout the manager and accepted and appreciated by clients.

Please include the following components in your submission:

➢ Testimonials from clients and other interested parties;
➢ A clear statement of what each service line is attempting to achieve
➢ Metrics used by the bank to assess how well it has lived up to its own expectations, including explanations of methodologies used.
➢ Real life examples and the extent to which banks entering each category have used the service line in question to influence the overall culture of the bank in regard to ESG, sustainability and impact.

In the thought leadership category judges will be looking for material and activity that adds to understanding and appreciation of this area amongst clients, the industry and/or the general public and could be in any format appropriate to the audience.
The **research** category applies to published material on specific topics, companies, sectors or investments that are specific to this sector.

The **communication strategy** category applies to internal and/or external communication and also includes a review of how the strategy has been implemented.

The **diversity and inclusion** category will be judged on the widest criteria of these terms and will not only look at the way that statutory obligations are met but also how personal differentiators such as education, class, cognitive difference and professional backgrounds are brought into the fold of a diverse and inclusive talent pool.

In the **CSR** category judges will be looking for examples of the manager initiating community activities for employees to engage with and also implementing schemes that have been brought forward by employees for consideration. The ways in which CSR activities can blend with work activities is an important part of this process. Specific examples and positive outcomes will be very much appreciated by the judges.

**Categories:**

Best sustainability & ESG thought leadership
Best ESG research
Best ESG portfolio (methodology)
Best ESG portfolio (performance)
Best sustainability offering
Best SRI offering
Best impact offering
Best philanthropy offering
Best philanthropy initiative
Best NextGen initiative or offering
Best ESG communication strategy
Best diversity and inclusion programme
Best CSR staff programme
Fund/asset managers – per region (Americas, UK, Europe, Switzerland, APAC)

Judges will be looking for clear evidence of how the ESG, Impact and Sustainability funds and products are differentiated from other “mainstream” funds offered by the manager. They will take note of how these funds conform to the established relevant definitions in each category and also how well they have performed relative to benchmark or other stated criteria.

A clear statement of what each fund is attempting to achieve would be appropriate as would any metrics used by the manager to assess how well it has lived up to its own expectations. Explanations of methodologies used would be most useful.

In the thought leadership category judges will be looking for material and activity that adds to understanding and appreciation of this area amongst clients, the industry and/or the general public and could be in any format appropriate to the audience.

The communication strategy category applies to internal and/or external communication and also includes a review of how the strategy has been implemented.

The diversity and inclusion category will be judged on the widest criteria of these terms and will not only look at the way that statutory obligations are met but also how personal differentiators such as education, class and professional backgrounds are brought into the fold of a diverse and inclusive talent pool.

In the CSR category judges will be looking for examples of the manager initiating community activities for employees to engage with and also implementing schemes that have been brought forward by employees for consideration. The ways in which CSR activities can blend with work activities is an important part of this process. Specific examples and positive outcomes will be very much appreciated by the judges.

Categories:

Best sustainability & ESG thought leadership
Best ESG Fund Methodology
Best ESG Fund Performance
Best Impact Fund Methodology
Best Impact Fund Performance
Best ESG Equities Fund
Best ESG Bond Fund
Best ESG ETF
Best ESG Thematic Fund
Best ESG Hedge Fund
Best ESG Thematic Fund
Best ESG Multi-Asset Fund
Best ESG Pension Fund Provider
Best ESG Private Equity Investment Fund
Best ESG Index Provider
Best fund manager diversity and inclusion programme
Best fund manager CSR staff programme

Family Offices (Americas, UK, Switzerland, Europe, MENA, APAC)

Judges will be looking for clear evidence of how ESG, Impact, Diversity and Inclusion initiatives, programmes and offerings are differentiated from other “mainstream” products and services offered by the family office. They will take note of how these offerings, services and products conform to the established relevant definitions in each category and also how effectively they have been implemented throughout the family office and accepted and appreciated by families.

Please include the following components in your submission:

➢ Testimonials from clients and other interested parties;
➢ A clear statement of what each service line is attempting to achieve
➢ Metrics used by the bank to assess how well it has lived up to its own expectations, including explanations of methodologies used.
➢ Real life examples and the extent to which banks entering each category have used the service line in question to influence the overall culture of the bank in regard to ESG, sustainability and impact.

In the thought leadership category judges will be looking for material and activity that adds to understanding and appreciation of this area amongst families, the industry and/or the general public and could be in any format appropriate to the audience.

The research category applies to published material on specific topics, companies, sectors or investments that are specific to this sector.

The communication strategy category applies to internal and/or external communication and also includes a review of how the strategy has been implemented.

The diversity and inclusion category will be judged on the widest criteria of these terms and will not only look at the way that statutory obligations are met but also how personal
differentiators such as education, class and professional backgrounds are brought into the fold of a diverse and inclusive talent pool.

In the **CSR** category judges will be looking for examples of the family office initiating community activities for employees to engage with and also implementing schemes that have been brought forward by employees for consideration. The ways in which CSR activities can blend with work activities is an important part of this process. Specific examples and positive outcomes will be very much appreciated by the judges.

**Categories:**

- Best sustainability & ESG thought leadership
- Best ESG research
- Best ESG portfolio (methodology)
- Best ESG portfolio (performance)
- Best sustainability offering
- Best SRI offering
- Best Impact offering
- Best philanthropy offering
- Best philanthropy initiative
- Best NextGen initiative or offering
- Best ESG communication strategy
- Best diversity and inclusion programme
- Best CSR staff programme

**Trust companies – per region (Americas, UK, Switzerland, Europe, MENA, APAC)**

Judges will be looking for clear evidence of how ESG, Impact, Diversity and Inclusion initiatives, programmes and offerings are differentiated from other “mainstream” products and services offered by the trust company. They will take note of how these offerings, services and products conform to the established relevant definitions in each category and also how effectively they have been implemented throughout the bank and accepted and appreciated by clients.
Please include the following components in your submission:

➢ Testimonials from clients and other interested parties;
➢ A clear statement of what each service line is attempting to achieve;
➢ Metrics used by the bank to assess how well it has lived up to its own expectations, including explanations of methodologies used.
➢ Real life examples and the extent to which banks entering each category have used the service line in question to influence the overall culture of the bank in regard to ESG, sustainability and impact.

In the **thought leadership** category judges will be looking for material and activity that adds to understanding and appreciation of this area amongst clients, the industry and/or the general public and could be in any format appropriate to the audience.

The **communication strategy** category applies to internal and/or external communication and also includes a review of how the strategy has been implemented.

The **diversity and inclusion** category will be judged on the widest criteria of these terms and will not only look at the way that statutory obligations are met but also how personal differentiators such as education, class and professional backgrounds are brought into the fold of a diverse and inclusive talent pool.

In the **CSR** category judges will be looking for examples of the trust company initiating community activities for employees to engage with and also implementing schemes that have been brought forward by employees for consideration. The ways in which CSR activities can blend with work activities is an important part of this process. Specific examples and positive outcomes will be very much appreciated by the judges.

**Categories:**

Best sustainability & ESG thought leadership
Best sustainability offering
Best SRI offering
Best impact offering
Best philanthropy offering
Best philanthropy initiative
Best ESG communication strategy
Best diversity and inclusion programme
Best CSR staff programme
Law firms – per region (Americas, UK, Switzerland, Europe, MENA, APAC)

Judges will be looking for clear evidence of how ESG, Impact, Diversity and Inclusion initiatives, programmes and offerings are differentiated from other “mainstream” products and services offered by the law firm. They will take note of how these offerings, services and products conform to the established relevant definitions in each category and also how effectively they have been implemented throughout the firm and accepted and appreciated by clients.

Please include the following components in your submission:

➢ Testimonials from clients and other interested parties;
➢ A clear statement of what each service line is attempting to achieve
➢ Metrics used by the bank to assess how well it has lived up to its own expectations, including explanations of methodologies used.
➢ Real life examples and the extent to which banks entering each category have used the service line in question to influence the overall culture of the bank in regard to ESG, sustainability and impact.

In the thought leadership category judges will be looking for material and activity that adds to understanding and appreciation of this area amongst clients, the industry and/or the general public and could be in any format appropriate to the audience.

The research category applies to published material on specific topics, companies, sectors or investments that are specific to this sector.

The communication strategy category applies to internal and/or external communication and also includes a review of how the strategy has been implemented.

The diversity and inclusion category will be judged on the widest criteria of these terms and will not only look at the way that statutory obligations are met but also how personal differentiators such as education, class, professional backgrounds and ways into the profession are brought into the fold of a diverse and inclusive talent pool.

In the CSR category judges will be looking for examples of the firm initiating community activities for employees to engage with and also implementing schemes that have been brought forward by employees for consideration. The ways in which CSR activities can blend with work activities is an important part of this process. Specific examples and positive outcomes will be very much appreciated by the judges.
Categories:

Best sustainability & ESG thought leadership
Best sustainability offering
Best SRI offering
Best impact offering
Best philanthropy offering
Best philanthropy initiative
Best ESG communication strategy
Best diversity and inclusion programme
Best CSR staff programme

Tech firms (Americas, UK, Switzerland, Europe, MENA, APAC)

Judges will be looking for clear evidence of how screening, reporting and data of ESG, Impact, Diversity and Inclusion initiatives, programmes and offerings are differentiated from other “mainstream” products and services offered by the company. They will take note of how these offerings, services and products conform to the established relevant definitions in each category.

Please include the following components in your submission:

➢ Testimonials from clients and other interested parties;
➢ A clear statement of what each service line is attempting to achieve
➢ Metrics used by the bank to assess how well it has lived up to its own expectations, including explanations of methodologies used.
➢ Real life examples and the extent to which banks entering each category have used the service line in question to influence the overall culture of the bank in regard to ESG, sustainability and impact.

In the thought leadership category judges will be looking for material and activity that adds to understanding and appreciation of this area amongst clients, the industry and/or the general public and could be in any format appropriate to the audience.

The communication strategy category applies to internal and/or external communication and also includes a review of how the strategy has been implemented.
The **diversity and inclusion** category will be judged on the widest criteria of these terms and will not only look at the way that statutory obligations are met but also how personal differentiators such as education, class and professional backgrounds are brought into the fold of a diverse and inclusive talent pool.

In the **CSR** category judges will be looking for examples of the firm initiating community activities for employees to engage with and also implementing schemes that have been brought forward by employees for consideration. The ways in which CSR activities can blend with work activities is an important part of this process. Specific examples and positive outcomes will be very much appreciated by the judges.

**Categories:**
- Best sustainability & ESG thought leadership
- Best technology enabled ESG service
- Best ESG screening solution
- Best ESG reporting solution
- Best ESG data solution
- Best ESG communication strategy by a technology company
- Best diversity and inclusion programme
- Best CSR staff programme

**Wealth Management Consultants (Americas, UK, Switzerland, Europe, MENA, APAC)**

Judges will be looking for clear evidence of how ESG, Impact, Diversity and Inclusion initiatives, programmes and offerings are differentiated from other “mainstream” products and services offered by the consultant. They will take note of how these offerings, services and products conform to the established relevant definitions in each category and also how effectively they have been implemented throughout the firm and accepted and appreciated by clients.

Please include the following components in your submission:

- Testimonials from clients and other interested parties;
- A clear statement of what each service line is attempting to achieve
- Metrics used by the bank to assess how well it has lived up to its own expectations, including explanations of methodologies used.
- Real life examples and the extent to which banks entering each category have used the service line in question to influence the overall culture of the bank in regard to ESG, sustainability and impact.
In the thought leadership category judges will be looking for material and activity that adds to understanding and appreciation of this area amongst clients, the industry and/or the general public and could be in any format appropriate to the audience.

The communication strategy category applies to internal and/or external communication and also includes a review of how the strategy has been implemented.

The diversity and inclusion category will be judged on the widest criteria of these terms and will not only look at the way that statutory obligations are met but also how personal differentiators such as education, class and professional backgrounds are brought into the fold of a diverse and inclusive talent pool.

In the CSR category judges will be looking for examples of the firm initiating community activities for employees to engage with and also implementing schemes that have been brought forward by employees for consideration. The ways in which CSR activities can blend with work activities is an important part of this process. Specific examples and positive outcomes will be very much appreciated by the judges.

Categories:

Best sustainability & ESG thought leadership
Best sustainability offering
Best philanthropy offering
Best philanthropy initiative
Best ESG communication strategy
Best diversity and inclusion programme
Best CSR staff programme