

## Awards Categories & Criteria

This document lists the categories for the *Wealth for Good* awards 2022. The introduction details the specific requirements on how the award categories will be judged.

The categories on pages 2 are listed per **business type**:

- Private Banks
- Private Asset Managers
- Fund/Asset Managers
- Family Offices
- Trust Companies
- Law/Accountancy Firms
- Tech Firms
- Wealth Management Consultants

Please include the applicable **geographic region** in which your organisation operates:

- Global
- Americas
- UK
- Europe
- Switzerland
- MENA
- APAC

Nominations close on:  
**23 December 2021**  
(12 midnight EST)

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### Introduction to the *Wealth for Good* Awards 2022 Categories

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 organisation.

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 organisation 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 organisation to assess how well it has lived up to its own expectations, including explanations of methodologies used; and
- real life examples and the extent to which organisation entering each category have used the service line in question to influence the overall culture of the organisation 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 organisation 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.



## Awards Categories & Criteria

### List of categories per business type:

#### PRIVATE BANKS

##### Categories

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

#### PRIVATE ASSET MANAGERS

##### Categories

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

#### FUND/ASSET MANAGERS

##### Categories

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

#### FAMILY OFFICES

##### Categories

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

#### TRUST COMPANIES

##### Categories

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

#### LAW/ACCOUNTANCY FIRMS

##### Categories

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

#### TECH FIRMS

##### Categories

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

#### WEALTH MANAGEMENT CONSULTANTS

##### Categories

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