

# ESG in sight - Sustainable investing

The perspective that takes you from  
action to impact



## Our approach for sustainable investing

### Our global knowledge used locally

ESG and climate risks are a global macroeconomic challenge. WTW has extensive years of experience in analyzing, advising and implementing sustainability aspects in the investment process. We have actively supported the move towards a more sustainable financial world in over 140 countries and shaped pioneering initiatives by the industry such as the Task Force on Climate-related Financial Disclosure (TCFD) and many others. WTW offers pension funds, charitable foundations, insurance companies, collective foundations and family offices worldwide and in Switzerland, support in integrating aspects of sustainability into the entire investment process.

### Relevance for Switzerland

It is fundamental for achieving the global goals for climate neutrality that financial flows are also geared sustainably. For a sustainable long-term portfolio, consideration of all investment risks and opportunities is essential, including environmental (E), social (S) and governance (G) aspects. In Switzerland, this integration is demanded in the sense of fiduciary responsibility, but also as a contribution to Switzerland's federal government 2030 Sustainable Development Strategy.

## Going beyond measurement

An effective sustainability strategy should be disciplined and focused to meet your specific needs. We support you in deriving your understanding of sustainability and developing your sustainability strategy. Together, we define your goals and discuss which sustainable investment approaches can best achieve them. We support you in building a sustainable portfolio that best reflects your individual principles. In doing so, we lay the foundations for a sustainability report for submission to any stakeholder and possible external partners.

**Our team of Swiss experts can help you integrate sustainability into the entire investment process, from mission and objectives to investment strategy, portfolio construction and manager selection, monitoring and reporting.**

# Our offering at a glance

1

## Development of your individual sustainability strategy

Building your knowledge of sustainable investing and stewardship and developing your sustainable investment beliefs, policies, and strategies, together with a chosen panel. Developing the information to be reported and the appropriate metrics to assess progress and goals.

2

## Portfolio Screening

Taking stock of your portfolio and analysing the extent to which sustainability criteria have already been taken into account, using our specially developed tool to evaluate your portfolio according to ESG indicators.

3

## Alignment of your portfolio with your sustainability strategy

Reviewing your investment principles and translating them into the portfolio context. Supporting you in creating a prioritization and an implementation plan. Notifying your asset managers and implementing the appropriate changes within your portfolio.

4

## Data Collection

Compiling and processing the required data of asset managers, external managers and other data providers to assess progress and ensure you reach your sustainability goals.

5

## Monitoring and reporting

Ongoingly monitoring your ESG strategy, preparing a regular sustainability report and supporting communication to third parties to ensure awareness.

## Are you interested?

## Feel free to contact us!



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### About WTW

At WTW (NASDAQ: WTW), we provide data-driven, insight-led solutions in the areas of people, risk and capital. Leveraging the global view and local expertise of our colleagues serving 140 countries and markets, we help you sharpen your strategy, enhance organisational resilience, motivate your workforce and maximise performance. Working shoulder to shoulder with you, we uncover opportunities for sustainable success — and provide perspective that moves you. In Switzerland WTW is based with offices in Zurich, Geneva and Lausanne.  
Learn more at [wtwco.com/en-ch](https://wtwco.com/en-ch)



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