

Accord Initiative Terms & Conditions

Investment professionals using the Accord Initiative website are requested to read and accept the following conditions:

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The Accord Initiative is a trading name of ESG Accord Ltd.

Access to the Accord Initiative is restricted to financial services professionals only.

ESG Accord Ltd is an independent technical compliance, due diligence and research provider.

ESG Accord Ltd does not give investment advice. All content is intended merely to highlight issues, it is not meant to be comprehensive, nor is it regulated advice.

Individuals without professional investment experience should not access the Accord Initiative site. Only information produced by an FCA regulated firm and issued or approved as a retail financial promotion should be shared with private investors.

ESG Accord Ltd obtains information and content for the Accord Initiative from third parties (providers of products and the broader industry) that we believe to be reliable, although we cannot guarantee the accuracy of the information provided. Any views or opinions expressed by third parties may not reflect those of ESG Accord Ltd or the Accord Initiative.

Information contained within the Accord Initiative should not be relied upon as instruction to invest.

Investment professionals should seek to make independent assessments for the client's general objectives/fact find, attitude to risk and capacity for loss, term of investment, pricing levels etc as well as their investment preferences and objectives.

Some of the products and services that ESG Accord Limited and the Accord Initiative includes information on may be considered;

- High risk/loss of capital. Invested capital is at risk. Past performance is not a guide to future returns
- Illiquid. There is unlikely to be a secondary market for shares within Tax Efficient Vehicles. Holding times for investments are longer for Tax Efficient Vehicles
- Tax efficient. The individual clients tax position must be part of the suitability assessment
- High risk/diversification. The overall available capital for investment should be diversified. Tax Efficient Vehicles may be suitable as part of a diversified portfolio (the majority being in more liquid and lower risk assets).

The information in the Accord Initiative site is not intended to constitute individual investment advice. It is provided for information purposes only and nothing herein constitutes investment, legal, accounting or tax advice. No recommendation or advice is being given as to whether any investment is suitable for a particular investor or a group of investors. Advisers should always conduct their own due diligence to verify information.

Should you have any questions please contact us on:
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