# II-HRD Sign On Sheet

*Please complete the following form and return as a pdf to:*

*angus.sargent@churchofengland.org*

|  |  |
| --- | --- |
| Official name of financial institution or organisation |  |
| Date completed |  |
| Level of involvement requested | Member of II-HRD; committing to the Terms of Reference  | [ ]  |
| Endorser of II-HRD; publicly endorsing the Initiative’s Objectives and Agreed Positions set out in the Terms of Reference  | [ ]  |

### How the Financial Institution would prefer to be known in correspondence

*Leave blank if no different to the official name above*

### Type of Financial Institution

Asset Owner [ ]

Asset Manager [ ]

Bank [ ]

Other:

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### Primary contact name and job title

*Response*

### Primary contact email

*Response*

### Secondary contact name and job title

*Response*

### Secondary contact email

*Response*

### Country where your financial institution is headquartered

*Response*

### Current total assets under management or advice (USD)

$

### Name and role of Institution representative

*Response*

### Signature of Institution representative

*Sign, paste or write signature*

**Institutions wishing to be a Member of the II-HRD should also complete the following section (i.e. Endorsers do not need to complete the following section):**

### Are you interested in becoming a Focus Group Lead?

No [ ]

Yes [ ]

 Focus Group 1 – ESG Data Providers [ ]

 Focus Group 2 – Proxy Advisors [ ]

 Focus Group 3 – Norms breaches [ ]

### Are you interested in becoming a Focus Subgroup Lead investor?

No [ ]

Yes [ ]

 Focus Group 1 – ESG Data Providers [ ]

 Focus Group 2 – Proxy Advisors [ ]

### All Members are expected to be active in at least one Focus Group. Please indicate which Focus Group you are able and willing to support:

 Focus Group 1 – ESG Data Providers [ ]

 Focus Group 2 – Proxy Advisors [ ]

 Focus Group 3 – Norms breaches [ ]

*Note that this is not a firm commitment at this stage. By ticking all three boxes, you are not bound to engage on all three groups. This will allow us to best divide up Member participation.*

### Which companies are you most interested in engagement with?

| **Company** | **High Interest** | **Medium Interest** | **Low Interest** | **No Interest** |
| --- | --- | --- | --- | --- |
| MSCI | [ ]  | [ ]  | [ ]  | [ ]  |
| Morningstar- Sustainalytics | [ ]  | [ ]  | [ ]  | [ ]  |
| Moody’s | [ ]  | [ ]  | [ ]  | [ ]  |
| Refinitiv (LSEG Group) | [ ]  | [ ]  | [ ]  | [ ]  |
| Bloomberg | [ ]  | [ ]  | [ ]  | [ ]  |
| Reprisk | [ ]  | [ ]  | [ ]  | [ ]  |
| ISS | [ ]  | [ ]  | [ ]  | [ ]  |
| Glass Lewis | [ ]  | [ ]  | [ ]  | [ ]  |

*Note that this is not a firm commitment at this stage. By ticking boxes, you are not bound to engage on all companies. This will allow us to best divide up Member participation.*

*--------------------------------END-----------------------------------*