

UKSIF is the membership association for sustainable and responsible financial services. We promote responsible investment and other forms of finance that support sustainable economic development, enhance quality of life and safeguard the environment. We also seek to ensure that individual and institutional investors can reflect their values in their investments.

As an UKSIF member, you can access a range of highly regarded services and can participate in relevant

- Participate in the UK-based network representing the broadest set of stakeholders in the sustainable finance sector.
- Increase your network of contacts in sustainable finance, access the industry and public policy knowledge and experience of our members and staff.
- Join cooperative efforts to influence government and policy makers on behalf of responsible finance.
- Attend UKSIF's programme of events for your membership category such as our highly-regarded analyst seminars.
- Receive invitations to networking opportunities, such as our Summer Event, as well as to events organised by UKSIF members and our partners.
- Benefit from involvement in industry initiatives such as Good Money Week.
- Highlight your organisation's details in our membership directory (available at www.uksif.org)
- Use the UKSIF logo on your website and marketing materials.
- Expand business opportunities and profile through sponsorship of UKSIF resources and activities.

Statement of Principles

By joining UKSIF, members subscribe to the following statement of principles:

- Members agree to support the work of and to disseminate information about UKSIF and the work of its members.
- Members commit to assist, either individually or with other UKSIF members, in improving the public's understanding of sustainable and responsible finance in supporting the theory and practice of sustainable and responsible finance.
- Members strive to act with a high degree of personal integrity, maintaining honourable relationships with colleagues, clients and all those who rely on the member's professional judgement and skills.
- Members seek continually to maintain and improve the knowledge, skills and competence relevant to their profession and be diligent in the performance of their occupational duties.
- Members make an affirmative commitment to apply honest, thorough and diligent methods of research and evaluation.
- Members should obey the laws and regulations relevant to their profession and should avoid any conduct or activity that would cause unjust harm to others.
- Members should use their membership in a manner consistent with the UKSIF Statement of Principles.

Next steps

- 1 Return your completed form to UKSIF, 83/84 Salisbury House, 29 Finsbury Circus, London, EC2M 7AQ, or via email using the "Submit via Email" button on the top left corner of page 3. We will contact you to acknowledge receipt of your application.
- 2 Applications for membership must be approved by our Board of Directors, which takes on average one to two months. Unless we advise you otherwise, you will receive in the meantime most membership benefits and an invoice for the membership fee. In the event that your application is rejected by the board, we will refund your fee in full. We will also ask you for the names of any additional colleagues who would like to be added to our member-only mailing list.
- 3 Once your application is approved by the board, we will contact you again to confirm your organisation's membership and provide any further information. We will also add you to our online membership director, using your logo if you have provided one.

UKSIF Membership Categories and Annual Fees

Membership fees are calculated according to an organisation's category and size. Please choose your category and, within that category, your organisation's size from the options below.

If your organisation is eligible under more than one category, then the highest membership fee applies. Final approval of your membership category is a decision of the UKSIF Board of Directors.

Not sure which category you are in? Call us on **+44 (0) 20 7749 9950**.

There is a separate form for **institutional asset owner affiliates**. Please ensure that you fill out the correct form.

Organisations promoting investments **and** not regulated in the UK are not eligible for immediate membership, but can apply to be an affiliate initially, paying the same fee as for membership. Please contact us for further details before completing this form. Call us on **+44 (0) 20 7749 9950** or email us at **membership@uksif.org**.

Categories of Membership

Group Category:

Financial Service Groups with multiple brands and/or functions. Group membership allows the businesses and brands to be listed separately as UKSIF members.

Fee by negotiation: (£14,185 + VAT minimum)

Category Three: Financial Advisers and Intermediaries (regulated by the FCA).

Full time staff (or equivalent) of 51+: £2,252 + VAT (£2,702.40)
Full time staff of 26-50: £1,124 + VAT (£1,348.80)
Full time staff of 11-25: £583 + VAT (£699.60)
Full time staff of 2-10: £294 + VAT (£352.80)
Sole Trader/Registered Individual: £147 + VAT (£176.40)

Category One: Banks/Investment Managers

Investment Managers, Investment Banks, Banks and Building Societies and other providers of investment management, investment banking and other banking services.

Funds over £5bn: £7,520 + VAT (£9,024)
Funds between £1 bn and £5 bn: £4,510 + VAT (£5,412)
Funds between £0.25 bn and £1 bn: £2,250 + VAT (£2,700)
Funds between £0.1 bn and £0.25 bn: £1,270 + VAT (£1,524)
Funds less than £0.1 bn: £635 + VAT (£762)

Category Four: Pension Funds, Charities and Others

Pension Funds, Foundations, Charities and NGOs, Trade Unions, Private Individual Investors and others (where not selling financial products or services, or related products or services).

Assets over £0.5 bn: £1,268 + VAT (£1,521.60)
Assets between £50 m and £0.5 bn: £440 + VAT (£528)
Other: £147 + VAT (£176.40)

Category Two: Professionals

Consultants, Research Providers and other providers of related products and professional services (unless covered in Category 1).

Full time staff (or equivalent) of 200+: £3,100 + VAT (£3,720)
Full time staff of 51-199: £2,400 + VAT (£2,880)
Full time staff of 26-50: £1,400 + VAT (£1,680)
Full time staff of 11-25: £750 + VAT (£900)
Full time staff of 2-10: £350 + VAT (£420)

Affiliation

For organisations that would like to benefit from UKSIF's services but do not wish to subscribe to UKSIF's objectives and principles, UKSIF offers affiliate status. Affiliate fees are equal to membership fees. Affiliates are not eligible to participate in the governance of UKSIF and may not use the UKSIF logo.

We are applying for affiliate status

Organisation

Name

Address

City/Town

Post Code

Website

Briefly describe your organisation's purpose and interest in sustainable and responsible financial services.

Total AuM of organisation

Main Contact(s)

UKSIF will contact the following people via e-mail regarding your organisation's membership benefits. Please provide at least one main contact. You will have the opportunity to provide additional colleagues' contact details to receive member benefits once your membership is approved.

Name (1)

Job Title

Email Address

Telephone

Name (2)

Job Title

Email Address

Telephone

For applicants outside the UK

If you have offices inside and outside the UK, which office is most directly connected with receiving UKSIF services?

Inside the UK

Outside the UK

If you are applying from the EU, please provide your organisation's VAT registration number.

VAT Registration Number

Declaration

We apply for UKSIF membership and agree to be bound by the Memorandum and Articles of Association of UKSIF (unless applying for affiliation).

We declare that we have read the membership category information on page 2 of this form and have selected the correct membership category and fee.

Name

Signature

Date

Method of Payment

Payment by BACS/bank transfer

We will send you an invoice for the appropriate fee with our account details.

Cheque enclosed Please make cheque payable to **UK Sustainable Investment & Finance Association** (an invoice will be emailed to you on receipt)

Contact for invoice/accounts if different from main contact (1)

Information for website

Following Board approval of your membership, your organisation's contact details and logo will be added to the membership directory on our website. Please provide the details you would like to be displayed. This could be an individual's contact details, or more generic details.

Contact

Telephone

Email Address

Website

Please include a copy of your logo as an attachment when you return this form by email.

You can fill in this PDF form and email it to us using the "Submit by Email" button at the top of this form.

Alternatively, please return your completed form to UKSIF, 83/84 Salisbury House, 29 Finsbury Circus, London. EC2M 7AQ.

Any questions? Call us on +44 (0) 20 7749 9950, or email us at membership@uksif.org.