



## Silver provides insightful and actionable guidance across all facets of a client's sustainability strategy.

As one of the first regulatory-focused firms to offer dedicated sustainability services, Silver's Sustainability Risk and Strategy (SRS) team partners with investment managers to develop, enhance and direct sustainability efforts across marketing, engagement, investment, reporting and compliance functions. We consistently deliver solutions that align with investment goals, compliance obligations and firm culture.

### Program Support

- **Policies and Procedures**  
Draft and refine policies that align with a manager's sustainability approach within investment processes
- **Diligence and Portfolio Management**  
Develop necessary tools and templates to support consistent review and analysis by the investment team
- **Data Management and Analysis**  
Assist with collecting, analyzing and visualizing data to uncover insights and engagement opportunities
- **Ongoing Support**  
Serve as long-term partners to scale and evolve sustainability initiatives

### Regulatory and Compliance Guidance

- **Audit and Compliance**  
Review sustainability programs to identify gaps, opportunities and benchmark against industry best practices
- **SFDR Services**  
Support the development of required disclosures for new SFDR registered products; create annual reports to satisfy on-going reporting obligations; and advise managers on voluntary SFDR-aligned disclosures
- **Reporting**  
Draft and refine regulatory filings across key jurisdictions, including Form 10-K, Form ADV, SFDR, CSRD and more
- **Regulatory Insight**  
Keep clients informed of cross-border regulatory developments and priorities
- **Engagement**  
Support clients in responding to proposed regulations through comment letters and industry group participation

### Education and Strategic Market Insight

- **Topic-Specific Training**  
Deliver customized sustainability training on key topics including climate change, evolving industry practices, investor trends and regulation changes
- **In-Depth Research**  
Provide tailored insights to guide strategic decision-making and actionable solutions on specific sustainability topics
- **Regulatory Mapping**  
Chart regulatory exposure across jurisdictions, entities and topics to keep clients informed

### Marketing and Disclosure

- **Sustainability Reporting**  
Draft annual investor reports that communicate sustainability-related performance, risks and goals
- **Marketing and IR Support**  
Assist marketing and compliance teams develop sustainability communications for current and prospective investors
- **Fundraising Support**  
Create and update materials, including DDQ responses, to meet investor expectations on sustainability topics
- **Marketing Review**  
Conduct comprehensive review of sustainability-related marketing efforts to ensure alignment with best practices and regulatory standards

### Framework Alignment and Reporting

- **PRI**  
Provide support for PRI efforts, from pre-Signatory assessments to Transparency Reporting
- **EDCI**  
Align metric identification and collection practices with EDCI standards
- **UK Stewardship Code**  
Prepare and/or review annual disclosures
- **TCFD**  
Develop reporting aligned with TCFD and ISSB recommendations for firms and their portfolio companies
- **Other Frameworks**  
Assist with various other obligations as-requested, including: OPIM, B-Corp, GRESB, ISSB, ESG IDP, TPI and others

### Bespoke Sustainability Strategy and Support

- **Climate Strategy**  
Develop and implement strategies that address climate-related risks and opportunities within the investment process
- **Greenhouse Gas Emissions**  
Support GHG emissions reporting for firms and their underlying portfolios
- **Corporate Sustainability**  
Define and develop corporate sustainability initiatives
- **Governance**  
Build actionable governance infrastructure that supports long-term program success

Signatory of:

