

# Mindful Money Awards

## Guide to Entering

Conference and Awards event: 4-7pm on Tuesday 29th June 2021  
Generator@GridAKL, Viaduct Harbour, Auckland CBD

**Entry Deadline:** 5pm, 10th May 2021



# The Awards Celebrating Investing for the Future

You are invited to make an entry to these inaugural awards. The aim is to celebrate the role that ethical and impact investing is playing in making money a force for good.

These awards are being launched at a time of mounting challenges posed by climate change, biodiversity loss and inequality.

Finance has a crucial role to play - the opportunity is for flows of investment to transform from being a driver of the problem to catalysing the solutions. The companies and individuals profiled in these awards are at the forefront of change.

We encourage a broad spectrum of entries, respecting diversity, recognising achievements whether small or large, and encouraging innovation.

*Nau mai, haere mai.*





## Why Enter?

Stand up and take a bow for your hard work and achievements! The awards provide recognition from your peers, the media and wider audiences.

These awards recognise the commitment of the New Zealand pioneers and leaders in the rapidly growing sector of sustainable finance. These are the first awards in Australasia dedicated to ethical and impact investing. They will set a benchmark for the future.

Entry to the awards is a valuable way to take stock of your progress and get feedback from your peers. The judges are experienced, skilled and objective, and will provide feedback for entrants. This is a valuable learning opportunity for category winners, those shortlisted and others.

*Mōhio ai koe ki te huarahi kei mua i a koe.*  
Our dream has a purpose, and our dream has a history.

# The Application Process

Make sure you have  
entered by  
5pm on 10th May  
2021.

## 1. Choose one or more categories to enter

Have a look at our award categories to work out which one best suits you best.

You can find the categories and questions [here](#).

## 2. Read the [Terms and Conditions](#)

## 3. Prepare and submit your answers

Each award entry has different questions and has a limit of 1,500 words overall.

We recommend preparing your story before starting the entry and then copying and pasting your answers into the online form. The questions can be downloaded from the Award Entry page [here](#).

Remember to include links to supporting documents and videos. Wherever possible, please put links into the entry rather than attaching documents (there is a limit of 5 documents, each less than 10MB).

## 4. Judging Process

Our team will compile the entries for the category judges. The judges will prepare a shortlist of finalists which will be published by the end of May.

Finalists will then be asked to add more detail to their impact story.

## 5. Buy Tickets

Encourage your friends, family and colleagues to come along to the awards ceremony.

Get your tickets to the event [here](#).

## 5. Celebration!

We then celebrate the finalists and especially the category winners at Generator@GridAKL in Viaduct Harbour on 29th June.

The event will start with a keynote speech by Adrian Orr, Governor of the Reserve Bank of New Zealand, followed by a panel on investing for climate action, and an exciting awards ceremony! We will finish with photos, drinks and networking.



## What are the Awards?

# Best Ethical Funds

Best Ethical KiwiSaver Fund Provider // Best New Ethical Fund 2021 // Best Ethical Retail Investment Fund Provider

The leading ethical or responsible funds go beyond simple exclusions or ESG risk management to ensure their funds do no harm and have a more positive impact on the climate, people and the environment.

***Do no harm:*** Most Kiwis want to avoid companies producing fossil fuels, nuclear weapons, gambling and other harm. And they want to avoid companies that violate human rights or breach animal welfare standards. How do your funds avoid doing harm?

***Invest in better companies:*** Investors want their hard-earned savings to align with their values. To what extent do your funds invest in better companies, with higher social and environmental standards and/or with positive impacts?

***Active Stewardship:*** Funds that manage investors' money have an important role to govern companies they invest in, to reduce social and environmental risk and raise standards. How do your funds use active ownership to improve the impact of companies in your portfolio?

***Showing Ethical commitment:*** Leaders in this growing ethical investment movement demonstrate their commitment to achieve change on a wider scale. How do you engage and educate the public on investing ethically and promote change more broadly?

***Earning good returns:*** Overall returns to ethical/responsible investment have, on average, been at least as high or higher than conventional funds. Can you show that your funds have also had high past returns?



## Most Effective Investment Fund for Climate Action

The transition to a zero carbon economy will need a massive switch of funding towards investments that reduce emissions, sequester carbon and strengthen New Zealand's resilience. This is a category which will grow rapidly in future years. We are now honouring the funds that are stepping up as pioneers.

This category is open to wholesale and public sector investment funds as well as retail funds. Entrants can be a public entity, social enterprise, not-for-profit, a collaboration or a commercial fund. The majority of investments within the fund must be focused on climate solutions. Since this is a fledgling sector, entrants may be new funds with plans to launch in 2021, as well as established funds.

The category winner will show tangible impact, including examples of investments that have the potential to contribute to replication and scale up. The fund will have a clear strategy for impact and sound systems for defining and measuring climate benefits and generating returns for investors.

## Best Impact Investment Fund

Impact investments are a distinct category that have the stated intention to generate positive social and environmental impacts, as well as earning a financial return. This is an exciting and rapidly growing part of the investment ecosystem. These awards will celebrate the New Zealand pioneers.

This category is open to wholesale and public sector investment funds as well as retail funds. Entrants can be a public entity, social enterprise, not-for-profit, a collaboration or a commercial fund. The majority of investments within the fund must be focused on positive social and/or environmental impact. Since this is a fledgling sector, entrants may be new with plans to launch in 2021, as well as established funds.

The category winner will show significant social and/or environmental benefits from their investments, a robust system for measuring their impact and a viable model to generate a financial return for investors.



## Best Ethical Financial Adviser

Financial advisers can potentially play a crucial role in promoting ethical/responsible investment and shaping it to meet the needs of their clients.

However, although ethical investing has shown good financial returns and strong public demand, it has yet to be fully embraced by the financial advice community. This category celebrates the achievements of the financial advisers who have been at the forefront of ethical and responsible investing.

The category finalists will demonstrate their commitment to ethical investment and the ways they integrate an ethical approach into a client-centred and evidence-based approach. The category winner will show excellence in these aspects and demonstrate leadership through embodying best practice.

## Best Media Reporting on Ethical Investment

There is strong support amongst the public for the concept of ethical/responsible investment but considerable confusion over what it means, in terms of standards, practices and the companies that funds invest in.

The media has a crucial role to play in helping the public understand that investment decisions have social and environmental consequences, exposing greenwash, and enabling investors to make informed choices on investing in credible funds.

The scope of this award is broad - across TV, radio, digital and print media. We are seeking a journalist or team that can demonstrate they have engaged, informed and educated the public about ethical and impact investment. The winner of this category will provide examples of their fresh and compelling treatment of ethical investment and the impact that their reporting has created.

**Deadline: 5pm on 10th May 2021**

[www.mindfulmoney.nz/awardsentry](http://www.mindfulmoney.nz/awardsentry)

