

# Mindful Money Awards

## Guide to Entering

Conference and Awards event: 4-7pm late June 2022  
Generator@GridAKL, Viaduct Harbour, Auckland CBD

**Entry Deadline:** 12pm 3rd of May



# The Awards: Investing for a Sustainable Future

You are invited to make an entry to the 2022 awards. The aim of the awards is to celebrate the role that ethical and impact investing is playing in making money a force for good.

This is the second year of the awards. Last year's awards showed there had been significant progress in the investment sector stepping up to meet the challenges of our time. This year we hope to see the frontiers of best practice extended further, offering real solutions to issues such as climate change, biodiversity loss and inequality.

We look forward to entries that demonstrate that flows of investment can progress from being a driver of the problem to catalysing the solutions. This year's winners will be at the forefront of this 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?



These awards are, above all else, a celebration of achievement. They provide recognition from your peers, the media and wider audiences.

These awards are focused on investment with a purpose. They are not just about managing social and environmental risk but being able to document how the investment approach improves real world impact. Entrants will be able to demonstrate their leadership role not just in systems and processes, but in making a difference.

These are the first awards in Australasia dedicated to ethical and impact investing and for the first time we have created a new category to include overseas funds that are actively marketed in New Zealand.

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, finalists 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 12am on 3rd May 2022.

## 1. Choose one or more categories to enter

Have a look at our award categories to work out which one(s) 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 for the overall application.

We recommend preparing your story before starting the entry and then copying and pasting your answers into the online form.

Remember to include links to supporting documents and videos in your application.

We expect fierce competition for the awards this year, so let us know about the outcomes you have achieved.

## 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 may 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.

Tickets will be on sale mid April.

## 5. Celebration!

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

We have contingency plans for COVID or other disruption, but at this stage we are planning for a fantastic in-person event.

We will finish with photos, drinks and networking.

# What are the Awards?

## Best Ethical Funds

### Best Ethical KiwiSaver Provider // Best Ethical Retail Investment Provider Best New Ethical Fund 2022 // Best Ethical Overseas Fund

The leading ethical or responsible funds go beyond simple exclusions or ESG risk management to ensure that investment results in a positive impact of investment 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, breach animal welfare standards or support regimes such as Putin's Russia. How do your funds avoid doing harm?

***Invest in better companies:*** Investors want the investment of their hard-earned savings to align with their values. To what extent do your funds invest in companies that have higher social and environmental standards and more positive impacts on people and the planet?

***Active stewardship:*** The investment providers that manage investors' funds have the responsibility to exercise sound corporate governance on behalf of their investors. They should use their stewardship role to reduce social and environmental harm, raise standards and generate positive impacts. How do your funds use active ownership to improve the impact of the 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 and decision-makers on investing ethically and promoting change more broadly?

***Delivering the best outcomes for clients:*** Clients have multiple expectations of their fund managers. They expect good after-fee returns, clear communications, a high degree of transparency and high standards of ethical practice. How do your funds deliver exceptional outcomes for clients?



## Best Net Zero and Climate Action Investor

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 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 entry criteria have been broadened this year. They still include investment funds that are focused on climate solutions, but also include other fund providers that are driving to achieve net zero emissions. Progress towards net zero must be documented, tangible and consistent with a 1.5 degree pathway.

The category winner will demonstrate leadership in contributing to action on climate change, using their investment funding to drive new climate solutions, and their leverage as investors to achieve change.

## Best Impact Investment Fund

Impact investments are a distinct category of investment funds. They have a purpose to generate positive social and environmental impacts alongside financial returns. This purpose must be implemented through a majority of the portfolio being invested in companies that achieve tangible and measurable improvements in social and/or environmental outcomes.

This is an exciting and rapidly growing part of New Zealand's investment ecosystem. These awards will celebrate the New Zealand pioneering funds.

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 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 play a crucial role in promoting ethical and responsible investment and shaping the portfolio of investments 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. Too many client engagements still fail to 'ask the ethical question', and fail to inform clients about ethical options that align with their values and aspirations.

This category celebrates the achievements of the financial advisers who are 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, 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 terminology, 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. They can expose misleading claims and greenwash, while highlighting the credible and impactful options available. Their outreach enables investors to make informed choices about investing in ethical 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.



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## Best Overseas Ethical Fund

This award will go to the best ethical overseas investment fund. Entry is open to funds that are actively marketed in New Zealand and made available to the New Zealand public through financial advisers or platforms.

This category is open to overseas ETFs, AUTs and other overseas registered funds.



**Deadline: 12am on 3rd of May**

**[awards.mindfulmoney.nz](https://awards.mindfulmoney.nz)**

