

Client Survey: SFDR and ESG

2022 will bring many changes to our industry and the related fund documentation.

We are always happy to assist you in all challenges ahead. In order to provide the best possible service to you, it would be helpful for us if you could complete the below survey:

If you had 3 wishes that would make your life easier when it comes to ESG/SFDR, what would these be? (multiple answers possible)

- Full support to produce your fund documentation
- Automating updates to
 - reduce delivery times, and/or
 - improve consistency
- Coordination & communication support between different teams

What are your biggest challenges? (multiple answers possible)

- Filing deadlines
- Volume of updates
- Managing multiple updates
- Keeping updates consistent (across various documents)
- Internal communication between teams/ involved parties
- Translation & integration of updated fund documentation
- Layout

For which documents would you need assistance? (multiple answers possible)

- Prospectus
- Annual and semi-annual reports
- UCITS KIIDs
- PRIIP KIDs
- Factsheets
- Website updates
- Regulatory forms
- Shareholder mailings
- Marketing and sales documents (presentations, brochures, etc. ...)

We thank you in advance for your feedback.
Your Prisma Project Team