



# What is sustainable professional advice?

These are the key elements of sustainable professional advice based on the conclusions of our group:

- **Competency** - A trained expert who is competent to give advice.
- **Role** - Sustainability is part of the job description and reward structures.
- **Risk** - Considers the risks of climate and nature breakdown based on short- and long-term advice.
- **Future-focused** – Aligns advice to a survivable future.
- **Education** - Considers the need for client education in the delivery of the advice.
- **Challenge** - Questions and challenges the status quo assumptions about the future.
- **Science-based** – Follows the scientific understanding of climate and nature risk.
- **Uncertainty** - Accepts the unknowns and communicates the limitations & uncertainty about the future.
- **Engagement** - Understands that clients are on a journey and their appetite for change will vary and hence a long-term plan is essential.
- **Process** – Has processes to identify & screen clients and advice models that default to sustainable outcomes.
- **Outcomes** – Delivers sustainable outcomes and avoids unsustainable outcomes.
- **Tax** – Ensure that clients pay the right amount of tax and in the right places.



# What sustainable professional advice is not?

Frequently, we see the following strategies (some of which are entirely worthy) presented as examples of sustainable professional advice when they are not.

- A marketing strategy
- Adding green or sustainable to your firm name
- A box-ticking exercise
- Decarbonising your operations (great, but it has nothing to do with the advice you provide)
- What your 'specialist team' delivers while you continue with talk of exponential growth on a finite planet.

Sustainable professional advice must be a whole firm approach that must come from the core and is based on a coherent advice philosophy.