

ESG Disclosures

Templates and services: helping you prepare for the March 2021 deadline and beyond

The EU's new ESG regulations present a significant challenge for fund managers. Firms will be required to make key strategic decisions about how sustainability is integrated into their investment management activities and to prepare complex new disclosures at both manager-level and product-level.

Simmons & Simmons stands ready to advise you on these requirements.

Services and templates

We are helping the industry with:

- scoping advice
- project planning
- strategic decision making
- our fund categorisation tool
- template policies
- disclosure wording
- advice on the legal process to update product documentation.

..... In putting together our menu of services and templates, and collaborating with you on your ESG project, we draw on our long track-record of working with the industry on regulatory change projects, our specialist knowledge of product documentation, and our expertise in respect of the new EU ESG regulations. We believe we offer solutions which are technically robust, commercially sound, and cost-effective.

Overview

Many important aspects of the EU's Sustainable Finance Disclosure Regulation (SFDR) will apply to **all** financial market participants, even those which do not have an express ESG-focus or sustainability focus (although some aspects of the SFDR will apply only to those financial products which have a specific ESG-focus).

We suggest that firms adopt a **three-phase** approach to ESG implementation projects:



How we can help you

- a checklist and menu of the types of scoping exercise, project documentation, legal documentation, compliance policies and disclosures which are likely to be required as a result of the SFDR and Taxonomy
- our fixed-fee pricing for standard ESG template documentation and disclosures
- bespoke pricing for other ESG documentation reviews and advice.

Contacts:

.....
Lucian Firth
 Partner
 T +44 20 7825 4155
 E lucian.firth@simmons-simmons.com

.....
Nick Colston
 Partner
 T +44 20 7825 4147
 E nicholas.colston@simmons-simmons.com