



## Introduction to Neil

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Neil sold his business in 2012 and moved from London to the west country with his young family. Not known for sitting still, Neil has since been active in several ventures including a new sustainable packaging business. As well as trying to make a difference through his business interests, he is keen to make sure his investments reflect his views about the environment.

**“I can sleep easily at night knowing that I’m achieving a good return for my investments but not at the cost to the sustainability goals that are important to me.”**

## Neil’s Story

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“Sustainability was already increasingly important to me by the time I sold my business a few years ago. So, my first requirement as I sought the right financial advisor was one who didn’t see sustainability and profitability as mutually exclusive. I wanted to see returns from my portfolio, but only from investments that were aligned with my own sense of purpose and commitment to fight climate change.

I wanted a balance between performance and environmental responsibility and that’s what I found at Edison. Other advisers and investment managers warned me that I would have to accept a performance hit if I was to invest in what was called, at the time, an ‘ethical portfolio’.

Edison discussed an investment strategy that had a fair chance of performing as strongly as a portfolio that wasn’t subject to ‘ethical screening’. As it has turned out, Edison’s sustainable investment management approach has outperformed unscreened portfolios.

I’m pleased to say I can sleep easily at night knowing that I’m achieving a good return for my investments but not at the cost to the sustainability goals that are important to me.

## Neil's Story (cont.)

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I'm delighted we appointed Edison to advise us as a family nearly three years ago now. What also stands out is the rigour they bring to making financial decisions, which you only appreciate when you see them help you make the right decisions in tough conditions. I think you could call it objective calmness."

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For a straightforward conversation, call us on 020 7287 2225 or email [hello@edisonwm.com](mailto:hello@edisonwm.com).

