

# **DO YOU WORK IN ASSET MANAGEMENT? GOOD NEWS:**

Read through this checklist and pick one or more actions to pursue. (Bonus: Work your way through all of them!)

# **RESEARCH AND EVALUATION**

Consider how climate change will impact a company's or industry's supply chains. Are they exposed to climate risks like heat waves, flooding, drought, or crop failures?

Look for companies focused on science-backed climate mitigation solutions that have an immediate impact on emissions and are currently available and financially viable.

Ask research prospects for more information on their climate disclosures, governance, commitments, and plan of action.

# **PORTFOLIO** COMPANY **ENGAGEMENT**

Work with leadership to create a climate engagement strategy with portfolio companies.

Require clear and publicly available greenhouse gas emissions data and financial risk disclosures.

# Encourage your firm to support shareholder resolutions that require companies to disclose and address climate risk.

# CLIENT **ENGAGEMENT**

Talk to clients about the importance of minimizing climate risk.

# FIRM **ENGAGEMENT**

Encourage your firm to conduct portfolio climate risk assessments via carbon accounting and scenario analyses.

Engage leadership to set clear policies and expectations for high-emitting sectors, including investment restrictions and carveout allocations.

## **DIALOGUE AND ACTION**

Reach out to experts and join coalitions to learn from peers and others leading on climate action.

Connect with other climate-concerned colleagues across job functions to build firmwide momentum on climate.

Ensure your firm is working toward developing its own publicly available plan to address climate change.

## **POLICY ADVOCACY**

Encourage leadership to develop sustainable finance policy positions and advocate for them by engaging with governmental and regulatory decision-makers.

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