Signatory application form

First name *
Last name *
Role *
Please enter your email: *

Introduction

Welcome to the PRI's signatory application process. We look forward to you joining us in our mission to achieve an economically efficient, sustainable global financial system for all.

Please read the following instructions carefully and note what information you will need to submit your application.

Organisations can become a signatory if they fall under one of these three categories:

Category Typical criteria

Asset owner

- Long-term investment motivation and
- institutional investor at the top of the investment chain, directly accountable to beneficiaries or the

government and

- investment discretion, including asset allocation, over all or most of its assets, (e.g. not subject to the direction of independent financial advisors (IFAs), or beneficiaries) and
- stable non-commercial governance arrangements or legislative frameworks (i.e. capital preservation and/or retirement provision is the primary motive, and they are ultimately answerable to pensioners or the government rather than shareholders).

Investment manager

- Make investment decisions according to guidelines stated in investment management agreements (IMAs) or fund formation documents and
- majority of assets subject to the direction of asset owners, IFAs or beneficiaries.

Service provider

- Provide investment advice to asset owners or investment managers, such as asset allocation and manager/product selection or
- deliver services such as proxy voting, data, etc.

Requirements

To complete the application, you will need the following:

- Signed (by your CEO or equivalent) declaration form* confirming your organisation's commitment to the Principles, on your company's letterhead.
- Organisational chart demonstrating ownership structure and legal entities in your group.
- Relevant contact and billing information.
- AUM and asset class information (not applicable for service providers).

*Please use the link below to download the relevant declaration form:

- Asset owner declaration form
- Investment manager declaration form
- Service provider declaration form

The application form can be saved for later. The average time to complete the application form is approximately 15 minutes.

The online application is best suited to be completed on desktop rather than handheld devices.

What happens next?

Once your application is received, it will be reviewed by our operations team, who will contact you directly if there are any queries.

Unless there are clarifications outstanding, applications will be processed within six weeks, and once approved you will receive your invoice.

Your journey as a signatory to the PRI starts on receipt of payment, and we look forward to collaborating with you.

Should you have any questions, please contact us at info@unpri.org

Please choose your application type *
O Asset owner application
OInvestment manager application
Service provider application

Organisational information

* = required fields

Overview

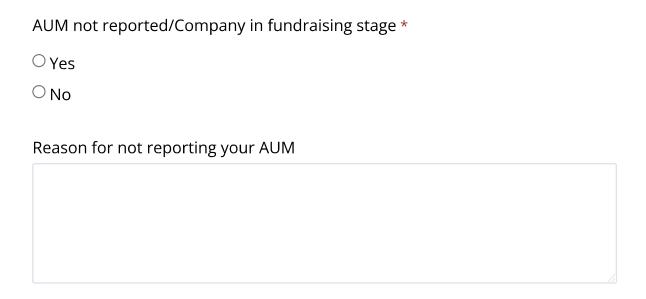
Name (as you would like it displayed on th	e PRI website) *
Head office street address *	
City *	

Province / state *
Post / zip code *
Country *
Q
If your main business operations are in a different location to your head office, please specify which country you would like to be listed under
Q
Any other office locations
Q
Does your organisation have a website? *
○Yes
○ No
Please provide website URL *
Please provide a reason why the organisation does not have a website *
Billing address
Same as head office street address *
Yes
○ Yes ○ No
Organisation's invoicing name *

Invoicing street address *	
Invoicing city *	
Invoicing state / province *	
Invoicing post / zip code *	
Invoicing country *	
VAT / tax identification number *	
Organisational information * = required fie	elds
Activities	
Are you part of a larger organisation? *	
○Yes	
○ No	
I confirm that my organisation is not a subsidiary or otherwise part of a largorganisation *	ger
○Yes	
Submit organisation chart *	
If you are part of a larger organisation or a subsidiary, please submit an organisation chart, showing legal entities in the group structure, with your	
application. Choose File No file chosen	
Only one file may be submitted, adding a new file replaces previous.	

Which of the following services do you offer? *	
□ Bank	
☐ Central bank	
☐ Co-operative	
\Box Corporate pension, superannuation, retirement or provident fund or p	olan
☐ Development finance institution	
☐ Endowment	
☐ Family office	
☐ Foundation	
☐ Government controlled fund	
☐ Insurance company	
Non-corporate pension or superannuation or retirement or provident or plan	fund
\square Sovereign wealth fund	
☐ Trade union	
□ Other	
Other (please specify) *	
Other (please specify) * Pension Type *	
Pension Type *	
Pension Type * Defined Benefit	
Pension Type * Defined Benefit Defined Contribution	
Pension Type * Defined Benefit Defined Contribution	
Pension Type * Defined Benefit Defined Contribution Hybrid	
Pension Type * Defined Benefit Defined Contribution Hybrid Insurance Type *	
Pension Type * Defined Benefit Defined Contribution Hybrid Insurance Type *	
Pension Type * Defined Benefit Defined Contribution Hybrid Insurance Type * Health	
Pension Type * Defined Benefit Defined Contribution Hybrid Insurance Type * Life Health Property and Casualty	
Pension Type * Defined Benefit Defined Contribution Hybrid Insurance Type * Life Health Property and Casualty Reinsurance Other	
Pension Type * Defined Benefit Defined Contribution Hybrid Insurance Type * Life Health Property and Casualty Reinsurance	

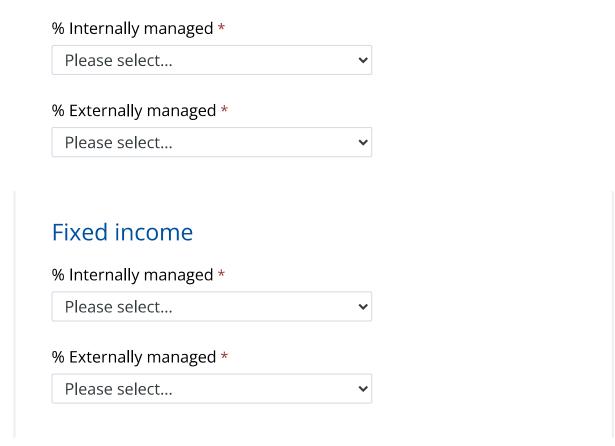
Pension Type *	
☐ Defined Benefit	
☐ Defined Contribution	
☐ Hybrid	
Please provide a brief description of your organisactivities *	ation and its primary
Your assets	* = required fields
What are your organisation's total assets under mobillion, including the assets of all your consolidate	-
The figure reported should represent total gross a commitments (e.g. in private equity or infrastruct funds, off-balance sheet assets and their portion (where relevant). The AUM figure should refer to market value is unavailable, we advise signatories realisable value estimate of those assets.	ure) and policyholders' of joint venture (JV) assets the market value. Where
Details	
Please provide the amount in US\$ - applicants car their currency to US\$ on the International Moneta	-
US\$ billion	
Please enter value as an integer or decimal placed numbe	
	r with dot as a decimal separator.
Date of AUM calculation	r with dot as a decimal separator.
Date of AUM calculation	r with dot as a decimal separator.



Asset class

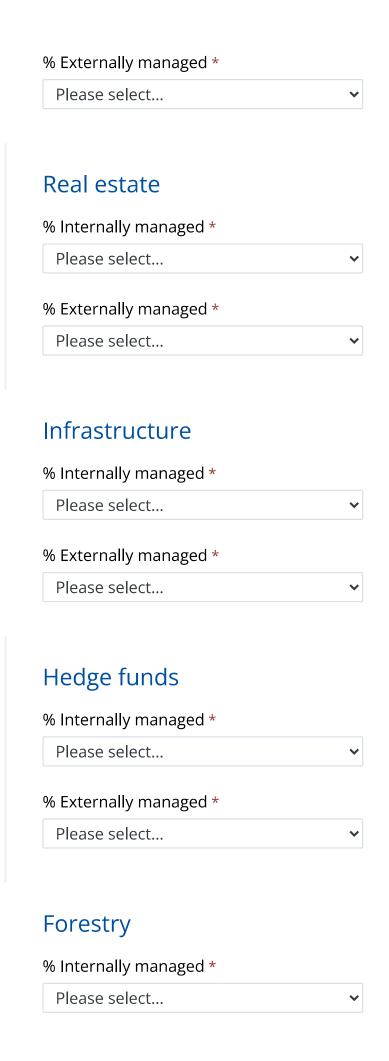
For definitions please see our Reporting Framework Glossary

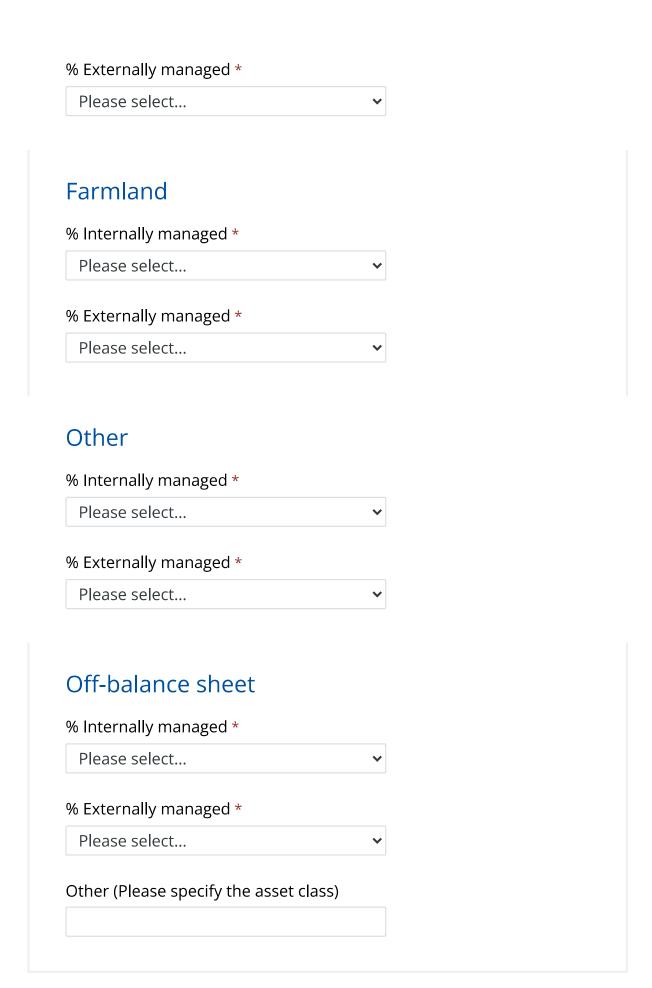
Listed equity



Private equity

% Internally managed *
Please select...





Feedback	
How did you hear about the PRI? *	
☐ Direct contact with a PRI representative	
☐ From a PRI signatory	
\square From a current or potential client	
☐ On social media	
\square In financial or pensions media	
\square At an event	
□ Other	
Other (please specify) *	
What prompted you to join the PRI?	
Contact details	* = required fields
Main contact for PRI communication	ns
This person will be sent all information relating to the (unless specified), and will be able to vote in the PRI one vote can be cast per signatory.	•
Title	
Please select 🕶	
Other (please specify)	
First Name *	

Last Name *
Role *
Email *
Eman
Discuss to
Phone *
P.A. email
Address same as HQ? *
○Yes
○No
Street address *
City *
Province / state *
Post / zip code *
Country *
Q

Indicate any additional role for this contact

□ Invoicing
□ Reporting
□ CEO
□ CIO
Indicate any additional role for this contact
□ Invoicing
□ Reporting
□ CEO
Invoicing contact
This person will be sent all signatory invoices.
Title
Please select 🕶
Other (please specify)
First Name *

Role * Email * Phone * P.A. email Address same as HQ? * Yes No Street address * City * Province / state * Post / zip code *	Last Name *
Email * Phone * P.A. email Address same as HQ? * Yes No Street address * City * Province / state *	
Email * Phone * P.A. email Address same as HQ? * Yes No Street address * City * Province / state *	
Phone * P.A. email Address same as HQ? * Yes No Street address * City * Province / state *	Role *
Phone * P.A. email Address same as HQ? * Yes No Street address * City * Province / state *	
Phone * P.A. email Address same as HQ? * Yes No Street address * City * Province / state *	
Phone * P.A. email Address same as HQ? * Yes No Street address * City * Province / state *	Fmail *
P.A. email Address same as HQ? * Yes No Street address * City * Province / state *	Linai
P.A. email Address same as HQ? * Yes No Street address * City * Province / state *	
P.A. email Address same as HQ? * Yes No Street address * City * Province / state *	Dh a a a di
Address same as HQ? * O Yes O No Street address * City * Province / state *	Phone *
Address same as HQ? * Yes No Street address * City * Province / state *	
Address same as HQ? * Yes No Street address * City * Province / state *	
YesNoStreet address *City *Province / state *	P.A. email
YesNoStreet address *City *Province / state *	
YesNoStreet address *City *Province / state *	
O No Street address * City * Province / state *	Address same as HQ? *
O No Street address * City * Province / state *	OVes
Street address * City * Province / state *	
City * Province / state *	○ NO
City * Province / state *	
Province / state *	Street address *
Province / state *	
Province / state *	
	City *
Post / zip code *	Province / state *
Post / zip code *	
Post / zip code *	
	Post / zip code *
	P. 1111
Country *	Country *
Country *	
O	Q
~	

Indicate any additional role for this contact

Reporting
□ CEO
□ CIO
Indicate any additional role for this contact
Reporting
CEO
Reporting contact
This person will be sent all information relating to the PRI's Reporting and Assessment process, and will be the main administrator of the Permissions System. This will allow them to manage your organisation's access to the reporting platforms (Reporting Tool and Data Portal).
Title
Please select 🕶
Other (please specify)
First Name *
Last Name *

Role *
Email *
Phone *
P.A. email
Address same as HQ? *
○Yes
○No
Street address *
City *
Province / state *
Post / zip code *
Country *
Q
Indicate any additional role for this contact
maleace arry additional role for this contact
СЕО

□ CIO	
Indicate any additional role for this contact	
□ CEO	
CEO (or equivalent)	
Title	
Please select •	
Other (please specify)	
First Name *	
Last Name *	
Role *	
Email *	
Phone *	
P.A. email	
Address same as HQ? *	
○Yes	
○No	

Street address *
City *
City
Province / state *
Post / zip code *
rost / zip code ··
Country *
Q
Indicate any additional role for this contact
□ CIO
CIO (or oquivalent)
CIO (or equivalent)
Title
Please select •
Other (please specify)
Carrel (piedse speelig)
First Name *
Last Name *
Last Name
Role *
Francil *
Email *

Phone *	
P.A. email	
Address same as HQ? *	
○Yes	
○No	
Street address *	
City *	
Province / state *	
Trovince / state	
Post / zip code *	
Country *	
Q	
Trustee (will receive the same	information as the
Trustee (will receive the same primary contact, minus voting	information)
	in in orthodorny
Title	
Please select •	
Other (please specify)	
other (pieuse speeliy)	
First Name	

Last Name	
Role	
Email	
Phone	
P.A. email	
Secondary contacts (will receive	ve the same information
as the primary contact, minus	voting information)
Title	
Please select •	
Other (please specify)	
- arrest quitales appears),	
E N	
First Name	
Last Name	
Role	
Email	
Phone	

P.A. email
Do they work specifically on ESG or RI issues?
○Yes
○No
Address same as HQ?
○Yes
○No
Street address *
City *
Province / state *
Post / zip code *
Country *
Q

All main and secondary contacts will receive the membership-related communications outlined in the PRI's Privacy Policy unless they opt-out. Users will be available to update their communication preferences when registering to the platforms.

Declaration

Upload your organisation's approval of the Principles by submitting the declaration you downloaded at the beginning of your application, signed by your CEO (or equivalent), and using your company letterhead. If you are raising a fund/funds, please include your organisation's expected total assets

under management (AUM) in US\$ billion, including the assets of all your consolidated subsidiaries.

Upload your signed declaration here *

Choose File No file chosen

Only one file may be submitted, adding a new file replaces previous.

The declaration templates are below.

- Asset owner declaration form
- Investment manager declaration form
- Service provider declaration form