

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

Category	Typical criteria
	<p>government <i>and</i></p> <ul style="list-style-type: none"> • 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) <i>and</i> • 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	<ul style="list-style-type: none"> • Make investment decisions according to guidelines stated in investment management agreements (IMAs) or fund formation documents <i>and</i> • majority of assets subject to the direction of asset owners, IFAs or beneficiaries.
Service provider	<ul style="list-style-type: none"> • Provide investment advice to asset owners or investment managers, such as asset allocation and manager/product selection <i>or</i> • 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 *

- Asset owner application
- Investment manager application
- Service provider application

Organisational information

* = required fields

Overview

Name (as you would like it displayed on the PRI website) *

Head office street address *

City *

Province / state *

Post / zip code *

Country *

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

Any other office locations

Number of investment staff at your organisation and/or staff that provides services used by investors *

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

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 fields

Activities

Are you part of a larger organisation? *

- Yes
- No

I confirm that my organisation is not a subsidiary or otherwise part of a larger organisation *

- 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 category best describes your organisation *

- Asset Consultants / Investment Advisors
- Audit / Assurance
- Brokerage
- Certification / Accreditation
- Data Management System Providers
- Engagements
- ESG Reporting or RI Reporting
- ESG Research
- Indices
- Industry Association / Investor Network
- Media
- PR / IR / Communications / Marketing
- Proxy Voting
- Stock Exchange
- Sustainability Consultant / Advisory
- Training / Education
- Other

Other (please specify) *

Please provide a brief description of your organisation and its primary activities *

Reasons for signing

* = required fields

Feedback

How did you hear about the PRI? *

- Direct contact with a PRI representative
- From a PRI signatory
- From a current or potential client
- On social media
- In financial or pensions media
- At an event
- Other

Other (please specify) *

What prompted you to join the PRI?

Contact details

* = required fields

Main contact for PRI communications

This person will be sent all information relating to the PRI, apart from invoices (unless specified), and will be able to vote in the PRI's Board elections. Only one vote can be cast per signatory.

Title

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 *

Indicate any additional role for this contact

Invoicing

Reporting

CEO

Invoicing contact

This person will be sent all signatory invoices.

Title

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 *

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

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 *

Indicate any additional role for this contact

CEO

CEO (or equivalent)

Title

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 *

Trustee (will receive the same information as the primary contact, minus voting information)

Title

Other (please specify)

First Name

Last Name

Role

Email

Phone

P.A. email

Secondary contacts (will receive the same information as the primary contact, minus voting information)

Title

Other (please specify)

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 *

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](#)