

SERVICE 01

ESG Portfolio Assessment

■ Illustrative Scenario

CLIENT PROFILE

Client Type	Multi-Family Office
AUM	\$680 million across 14 family clients
Location	Southwest United States
Situation	Next-generation family members requesting ESG integration; existing portfolios never formally assessed
Engagement	One-Time Assessment Report \$22,000

THE CHALLENGE

A Southwest multi-family office managing \$680 million across 14 family relationships faced increasing pressure from next-generation beneficiaries to understand and improve the ESG profile of their collective portfolios. The firm had no formal ESG framework, no standardized scoring methodology, and no way to report on sustainability factors to clients who were beginning to ask.

The firm's investment committee needed a credible, third-party assessment that could serve as both a baseline measurement and a board-presentable deliverable — establishing where the portfolios stood today before committing to any ESG implementation strategy.

VERDE ADVISORS APPROACH

Verde Advisors conducted a comprehensive ESG audit of the firm's full investment portfolio, assessing each manager and asset class against leading frameworks including MSCI ESG ratings, TCFD climate alignment, and UN PRI principles.

The engagement involved reviewing existing manager documentation, conducting targeted data requests across 23 investment managers, and applying a proprietary ESG scoring rubric developed from institutional best practices. Each manager was evaluated across environmental, social, and governance dimensions with scores normalized for asset class context.

The resulting report provided an overall portfolio ESG score, individual manager assessments, sector-level exposure analysis, and a tiered action plan prioritizing the highest-impact improvement opportunities by implementation complexity and estimated portfolio benefit.

KEY DELIVERABLES

- Portfolio-level ESG score using MSCI framework benchmarking across all 23 managers
- Individual manager ESG assessments with red/yellow/green ratings and qualitative commentary
- Sector and asset class ESG exposure heatmap identifying concentration risks
- Climate alignment analysis using TCFD framework — physical and transition risk summary
- Tiered action plan with 12-month, 24-month, and long-term recommendations
- Board-ready executive summary presentation (12 slides)

OUTCOMES & RESULTS

23	\$680M	12-Month
Managers Assessed	Portfolio Covered	Implementation Roadmap

This is an illustrative scenario based on the types of engagements Verde Advisors is equipped to deliver. Client details are hypothetical. Results will vary based on portfolio characteristics and market conditions.