

SOCIALLY RESPONSIBLE INVESTING

A proven platform and a trusted resource for socially responsible investing (SRI) is now available for individuals, professionals and business owners.

Investing your money to make a difference

The idea behind SRI—also called environmental, social, and governance (ESG) investing—is to help investors pursue their financial goals while promoting societal well-being.

By choosing a socially responsible investment, you are essentially funding companies that support causes you care about and avoid practices that run contrary to your values.

For example, you might choose to invest in companies that promote:

- Environmental Protection
- Community Development
- Workplace Diversity
- Human Rights

On the other hand, you might decide to avoid investing in companies involved in:

- Alcohol, Tobacco, and Gambling
- Weapons
- Nuclear Power
- Animal Testing
- Many Others

The investment managers who create and oversee SRI portfolios evaluate companies according to specific values-based criteria or “social screens.” As an investor, you can evaluate an SRI investment based on its objectives and the social screens it employs.

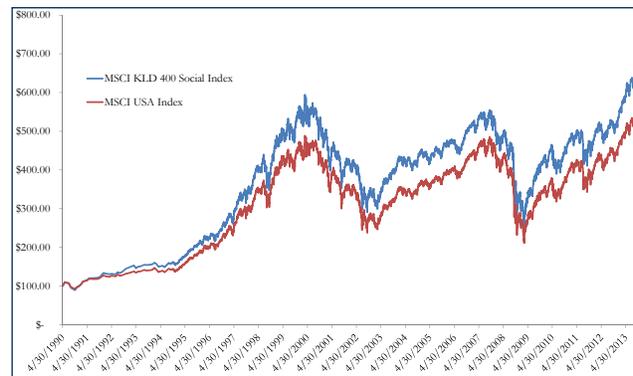
Performance

As SRIs were developing, investors may have sacrificed return on investment but that is not always the case. In fact, the following chart compares two rates of return. You'll see that the SRI outperforms the traditional investment.



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Socially Responsible Investing (U.S.) Vs. Traditional Investing (U.S.) Comparison of \$100 Investment



Source: Bloomberg

Creating and implementing a socially responsible portfolio

The most compelling feature of SRIs is obvious: the ability to invest your money in causes you care about with the possibility of personal financial gain.

- You already know that you need to invest.
- SRI lets you take a social stand through the particular investment vehicles you choose.
- SRI portfolios seek to deliver long-term wealth to shareholders in a socially conscious way.

Our firm has selected an array of asset classes and model portfolios that includes a diverse range of investment choices, helping to ensure that no matter your financial objectives, there is an investment portfolio that is right for you.

Whether you choose to invest all or a portion of your assets in an SRI portfolio, you can rest assured that we are keeping an eye on your long-term goals as well as your social convictions. Join me in finding the right fit for you.

Investing in the stock market involves gains and losses and may not be suitable for all investors. The investment's socially responsible focus may limit the investment options available to the investment and may result in returns lower than those from investments not subject to such investment considerations. Past performance is no guarantee of future results.