Environmental, Social and Governance (ESG) Investing* Screens companies based on how they score on the three ESG factors.

*Adviser Investments’ chosen approach.

Socially Responsible Investing (SRI) Uses morals-based investing rules to avoid “harmful” industries or companies.

Impact Investing Invests in funds or companies that do measurable social or environmental good.

Goal: Do well while doing good

Benefits of ESG
- You feel better about your investment portfolio.
- Mitigating environmental and social risks can help companies sustain competitive advantages.
- Good governance helps companies avoid bad-for-business scandals.

Other Considerations
- Ratings can be subjective: What is “good” and “bad”?
- Limits the investment universe.
- Excluding certain industries or securities may cause portfolios to be out of step with the markets.

Ratings
More than 120 organizations provide ESG ratings.

- Many large institutions follow the United Nations Principles of Responsible Investment, including Vanguard, Fidelity, BlackRock/iShares and Nuveen.
- Leading research providers include Morningstar, Sustainalytics, MSCI and FTSE.

Adviser Investments ESG Strategies

ESG Core is a comprehensive, globally diversified portfolio tailored to your personal investment objectives and risk comfort zone. ESG Dividend Income is a stock-only portfolio that invests in companies with a history of paying and growing dividends.

If you’d like to learn more about these strategies, please call or email us today!

info@adviserinvestments.com  www.adviserinvestments.com  800-492-6868

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