Socially Conscious Investing

Are you thinking of aligning your portfolio with your values? Discover three common approaches and how Adviser Investments can help you invest with a clear conscience.



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

- 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.

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!

Our podcast on the topic: https://bit.ly/2HIHakq.



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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.



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