

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

- 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!

Our podcast on the topic: <https://bit.ly/2HlHakq>.

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