Socially Responsible Investing
Sustainable and Responsible (SRI)

By Hewins Financial

SRI recognizes that corporate responsibility and societal concerns are valid parts of investment decisions. SRI considers both the investor’s financial needs and an investment’s impact on society.

SRI Competitive Returns

S&P 500 vs. FTSE KLD 400

Index Returns 1990-2009

From 1995-2012, the total dollars under management in SRI grew from $639 billion to 3.74 trillion, outpacing the market.

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3.74 trillion
11% of total U.S. investment marketplace

Also known as:

Mission Investing, Responsible Investing, Double or Triple Bottom Line Investing, Ethical Investing, Sustainable Investing, Green Investing

3 Main Criteria
Environmental, Social, Governance

The SRI World
Involved Investing

GROWTH AND APPROACHES

MORE THAN ONE OF EVERY UNDER PROFESSIONAL MANAGEMENT

2010 - 2012 GROWTH RATE > 22%

MORE THAN ONE OF EVERY UNDER PROFESSIONAL MANAGEMENT

2012 $640.5 trillion
1995 $3.74 trillion

PROFESSIONAL MANAGEMENT

Sustainable and responsible investors include individuals and also institutions, such as corporations, universities, hospitals, foundations, insurance companies, public and private pension funds, nonprofit organizations and religious institutions. Institutional investors represent the largest and fastest growing segment of the SRI world.**

APPROACH ONE

Screening*

Positive and Negative Screens – used to evaluate investment portfolios or mutual funds.
Criteria:
- Social
- Environmental
- Good Corporate Governance

Profitable companies that do good in the world. Avoid companies with harmful practices to workers and communities.

APPROACH TWO

Shareholder Advocacy*

Shareholder Advocacy – investors take an active role in company’s social, environmental or governance concerns in a sustainable and responsible manner.

Actions:
- Talking with company decision-makers
- Filing resolutions on different topics
- Generating investor pressure on management

APPROACH THREE

Community Investing*

Community Investing – providing access to capital, credit and basic banking products to communities underserved by traditional financial institutions.

Access allows local organizations to help low income individuals and supply small businesses and community services.

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* Source: USSIF, http://ussif.org/resources/sriguides/sriguides.cfm

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