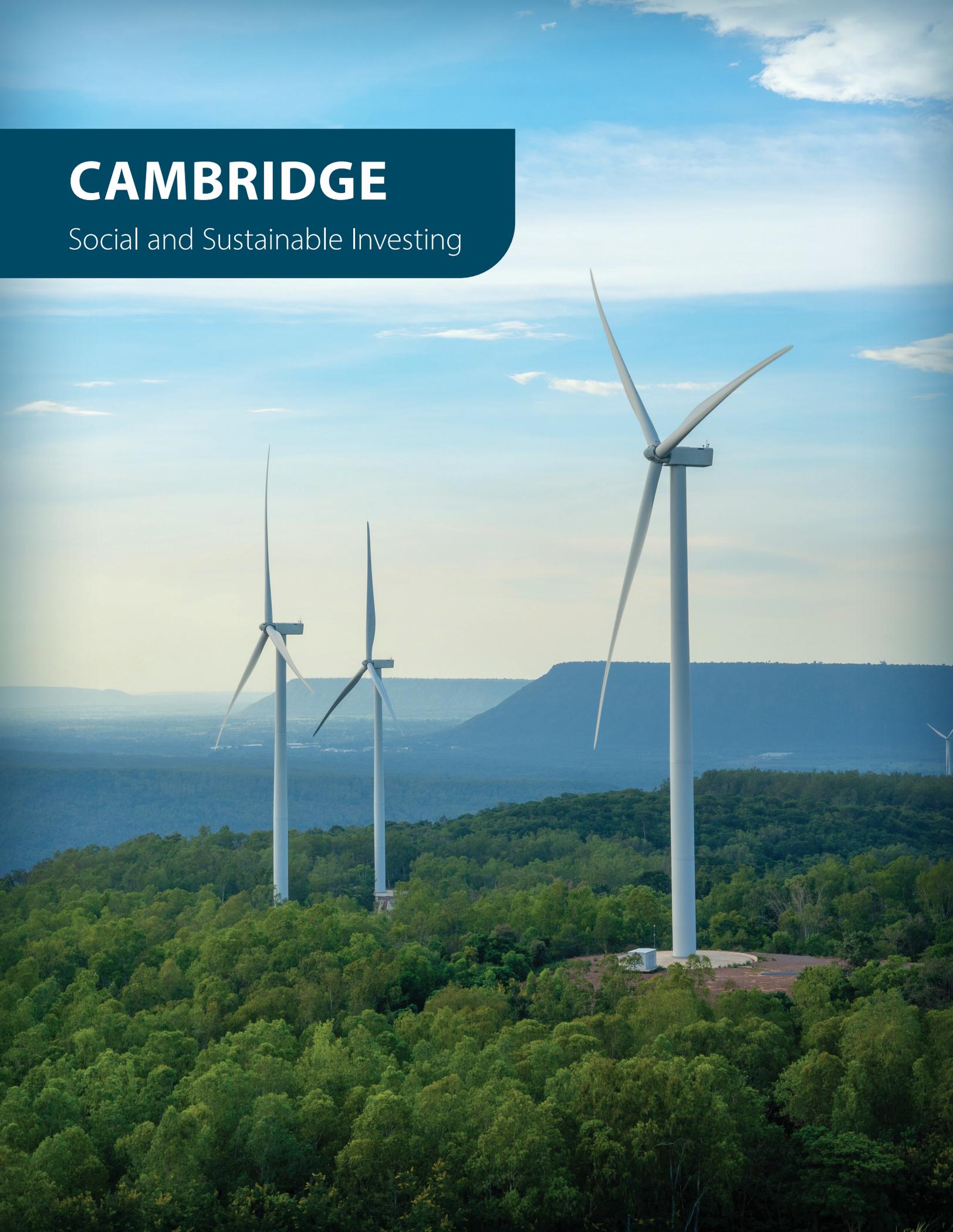


CAMBRIDGE

Social and Sustainable Investing



Cambridge Social and Sustainable Investing

Social and sustainable investing is investing with a purpose. Over a quarter of all professionally managed assets in the United States were invested according to these principles.¹ Common reasons that may lead a client to incorporate social and sustainable investing into their portfolios include:

Seek to make a difference in the world

The potential for better investment outcomes

Alignment of investments with their personal values

Now, you can help clients achieve those objectives.

Cambridge Social and Sustainable Investing is a collection of resources built to help advisors meet the Environmental/Social/Governance (ESG) and Faith-based Investing needs of their clients through learning, researching, and networking.

What Is ESG Investing?

Clients interested in this category of investing are watchful of a company's environmental, social, and governance operating practices and impacts. The following lists include examples of common review areas.

Environmental Impact		Social Practices		Governance	
	Pollution and waste		Employee and stakeholder relationships		Shareholder rights
	Energy sources and use		Health and safety		Limiting conflicts of interest
	Adherence to environmental law		Philanthropic efforts		Transparency and accuracy in accounting

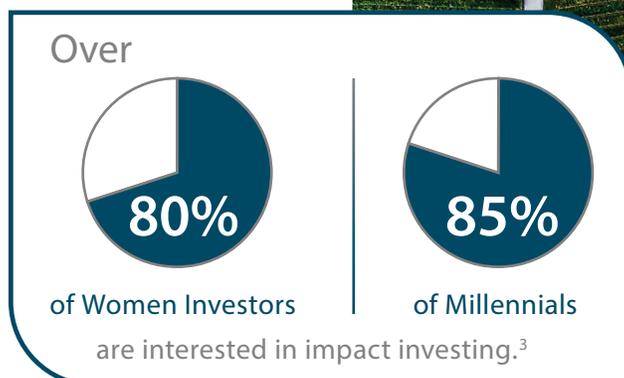
What Is Faith-based Investing?

Clients interested in faith-based investing screen investments and companies to see how their practices align with their faith. Funds and products in this category will exclude investments in companies that conflict with a faith's teachings, and include companies that align with a faith's teachings. There are faith-based investing solutions that align with many religions.

A suite of solutions for advisors at any level of experience with social and sustainable investing.

CAAP^{®2} Strategies:	Multi-asset and equity SMA strategies focused on ESG or faith-based investing are available
Product Database:	Learn about product managers and individual products with an ESG or faith-based focus
WealthPort[®] UMA Exclusionary Screening:	This screening tool allows advisors to exclude specific stocks from a Unified Managed Account (UMA)
Impact Cash:	Generate social impact through deposit accounts at community banks that serve small businesses, rural, and low-income markets
Donor-advised Funds:	Give clients a tax-incentivized way to donate to charitable organizations
Education Resources:	Advisor resource materials and client-facing educational collateral
Network with other advisors through Cambridge Nation discussion groups and Cambridge events	

Social and sustainable investing increased 38% from 2016 to 2018¹



**Help your clients
make an impact**

Contact clientsolutions@cir2.com
at 800-777-6080 for more information.



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¹USIFF Forum for Sustainable and Responsible Investing, 2018 Trend Report

²CAAP® is a registered mark of Cambridge Investment Research, Inc. for its program for investment managers.

³Morgan Stanley Institute for Sustainable Investing, Sustainable Signals: New Data from the Individual Investor, 2017