

Mary C. Rinehart, CFP®
presents

What is
Socially Responsible Investing
&
Sustainability
AND
Why is it Important ?

FINANCIAL CAPITAL

How we invest our FINANCIAL CAPITAL

**... in a CHRISTIAN way and for a Socially JUST
and ENVIRONMENTALLY SUSTAINABLE World !!!**

Socially Responsible Investing (SRI) – 30 years ago

Incorporating a person's ethical, social and/or religious principles into their investment decisions

Screening out Alcohol, Tobacco, Nuclear, Military, etc.

Paper Drives

Tree Commissions

Socially Responsible Investing (SRI) – Today 1989

Sustainability – “working toward a socially just and environmentally sustainable world”

Making decisions based on a company’s alignment of SOCIAL, ENVIRONMENTAL and FINANCIAL performance

Ways to work in the area of Social Justice and in an Environmentally Sustainable World

1 - Screening Technologies

Strengths and Concerns

Areas for Screening a Corporation

Community

Diversity

Corporate Governance

Employee Relations

Environment

Human Rights

Product Safety

Ways to work in the area of Social Justice and in an Environmentally Sustainable World

2 – Shareholder Advocacy

Voting proxies

Working with interest groups

Boycotting

Ways to work in the area of Social Justice and in an Environmentally Sustainable World

3 – Micro Financing / Micro Credit

Providing CAPITAL for loans to those that have no access to traditional financial services

International Movement

Many organizations / institutions and local groups

Oikocredit

Women's World Banking

Self-Help Credit Union

Calvert Notes

Accion Int'l

CRA Fund

Areas of Concern

Environment – air, water and earth

Employee Relations

Corporate Governance

What are your VALUES ?

What is Important to YOU ?

Can I SHARE my values and make a DIFFERENCE in the world ?

Can I use my CAPITAL (Human Capital + Financial Capital)
**to make a DIFFERENCE for a socially
justified, environmental sustainable world ?**

THE NEW SRI