



Investing in your values

TAKE ACTION – HAVE A POSITIVE IMPACT EVERY DAY

Many of our daily decisions – what we eat, what we buy, where we work – are based on our **values**.

Invested Values (a service of Colin Price Consulting LLC) helps people better understand their values as they relate to investing and clearly articulate those values so that they can effectively integrate them into their retirement investments.

You don't have to choose between your conscience and your bank account. Research shows that investing in companies that show strong performance on material environmental, social, and governance (ESG) issues can result in better returns and lower long-term risk.

BETTER WORLD, BETTER RETIREMENT

Since ESG issues are not typically captured by traditional financial assessment of companies, investors are often left flying blind. Not only are they missing out on the chance to have a positive impact and invest with their values, they are missing key information about risks and opportunities.

COMPETITIVE RETURNS

Empirical data from thousands of studies shows comparable performance over time and positive links between strong sustainability/ESG performance in companies and strong financial returns for investors.

LOWER COSTS

It's possible to lower your costs while also selecting ESG screened funds that align with your values. Investors should have access to better, lower cost funds, which can help increase their returns over time.

OUR PROCESS

We provide expertise in measuring and understanding investor values. Through our efficient, data-driven process we will help you take some important first steps in making more sustainable retirement investments.

Our collaborative three-step process includes the following:

1) Taking a survey: What do you value related to your investments? We'll help you find out quickly.

2) Making a statement: Using your survey responses, we'll craft a customized investment values statement that reflects your values and provide you with a data summary.

3) Taking action: Investors work with their advisors to integrate their values into their investment decisions and portfolios (e.g. 401k).

We believe that values-based investors are just like traditional investors: They want competitive financial returns from their retirement investments. Fortunately, making responsible investments based on your values doesn't have to cost more.

LET'S GET STARTED

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