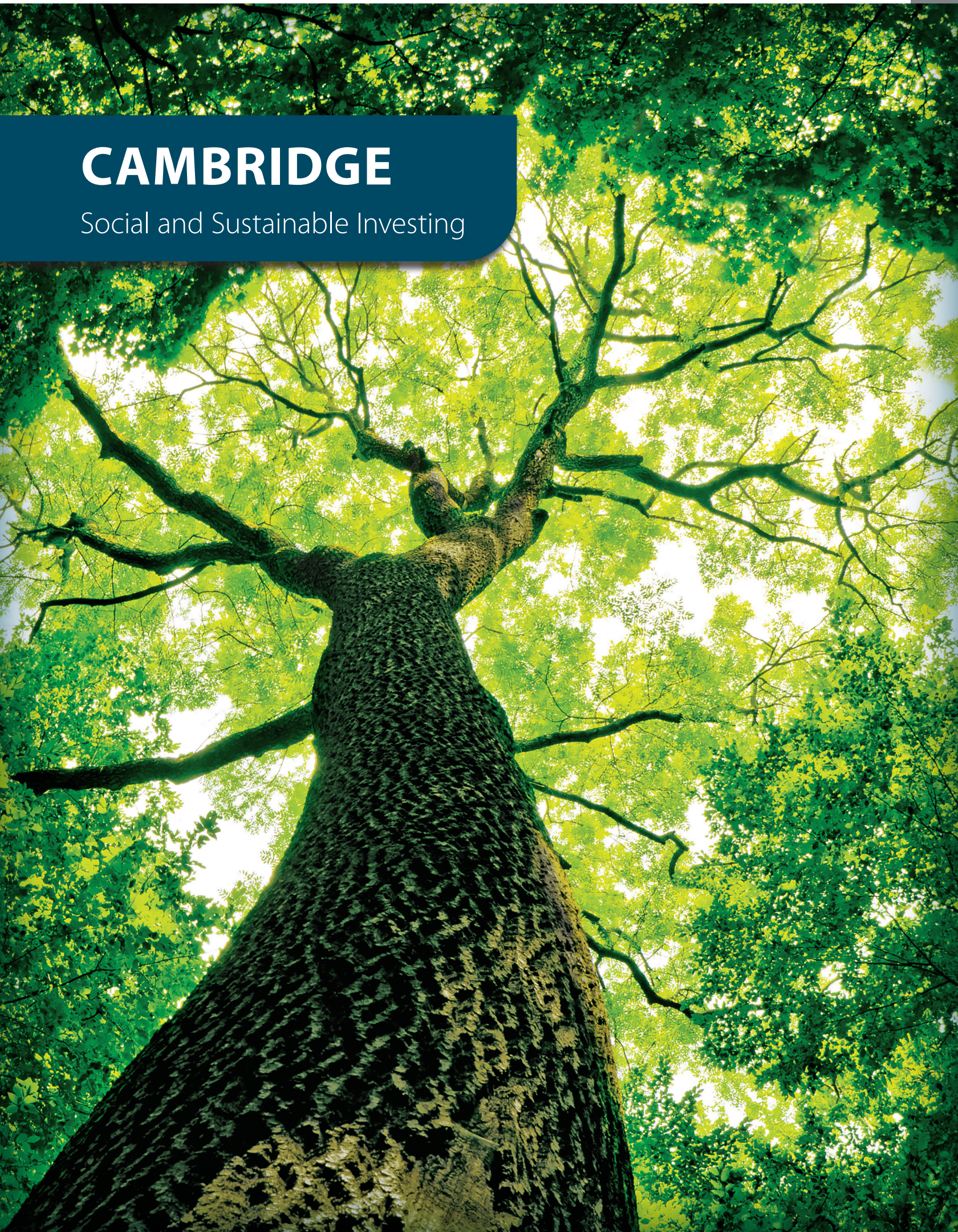


# CAMBRIDGE

Social and Sustainable Investing





# Cambridge Social and Sustainable Investing

Social and sustainable investing is investing with a purpose. Thirty-three percent of all professionally managed assets in the United States were invested according to these principles.<sup>1</sup> 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 financial professionals 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.

<b>Environmental Impact</b>		<b>Social Practices</b>		<b>Governance</b>	
	Pollution and waste		Employee and stakeholder relationships		Shareholder rights
	Energy sources and use		Health and safety		Limiting conflicts of interest
	Adherence to environmental law		Diversity and inclusion		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 and beliefs.

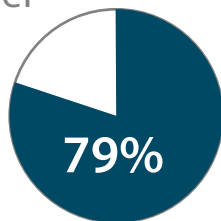
<sup>1</sup>Investing involves risk. Depending on the different types of investments there may be varying degrees of risk. Socially responsible investing does not guarantee any amount of success. Clients and prospective clients should be prepared to bear investment loss including loss of original principal.

## A suite of solutions for financial professionals at any level of experience with social and sustainable investing.

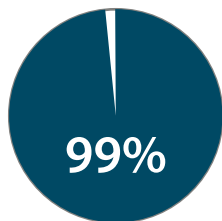
<b>CAAP<sup>®2</sup> Strategies:</b>	Multi-asset and equity SMA strategies focused on ESG or faith-based investing are available with minimum investments starting at \$5,000
<b>Product Database:</b>	Learn about product managers and individual products with an ESG or faith-based focus
<b>WealthPort<sup>®</sup> UMA Exclusionary Screening:</b>	This screening tool allows advisors to exclude specific alcohol, tobacco, and firearms stocks from a Unified Managed Account (UMA)
<b>Impact Cash:</b>	Generate social impact through deposit accounts at community banks that serve small businesses, rural, and low-income markets
<b>Donor-advised Funds:</b>	Give clients a tax-incentivized way to donate to charitable organizations
<b>Education Resources:</b>	Financial professional resource materials and client-facing educational collateral
<b>Network</b> with other financial professionals through study groups, Cambridge Nation discussion groups and Cambridge events.	

Social and sustainable investing AUM grew by 42.5% from 2018 to 2020<sup>1</sup>

Over



of individual investors



of millennials

are interested in social and sustainable investing.<sup>3</sup>

**Help your clients  
make an impact**

Contact [clientsolutions@cir2.com](mailto:clientsolutions@cir2.com)  
at 800-777-6080 for more information.

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<sup>1</sup>USIFF Forum for Sustainable and Responsible Investing, 2020 Trend Report

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

<sup>3</sup>Morgan Stanley Institute for Sustainable Investing, Sustainable Signals: U.S. Individual Investors Maintain Strong Interest in Sustainable Investing Despite COVID-19 Pandemic, 2021

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