

Your Money, Your Choice

Name:

Date:

Once you provide your values direction we would come up with a proposed list of companies you can further edit.

CAUSES *(Please check all that apply)*

Invest in Disability Inclusion

Reduce Greenhouse Gas Emissions

Defund Pipelines On Indigenous Land

Divest From Dark Money

Fight Deforestation

Reduce Fossil Fuel Producers

Divest From All Fossil Fuels

Heart Healthy

Invest in Your Community

Invest In Companies That Support LGBTQIA+

Employees

Divest The Prison Industrial Complex

Invest in Racial Justice

Support Refugees

Invest in Ethical Supply Chains

Divest From Big Tobacco

Divest From Weapons

Invest In Women Leaders

Support Animal Welfare

Catholic Values

Halal Investing

Inclusions

Exclusions

Unique Features:

Custom ESG Portfolios - Build tailored portfolios using individual stocks and fixed income funds that reflect your values, all without sacrificing returns. We offer customization currently across 17 environmental and social causes.

Impact Reporting - Deliver transparent results that reflect the tangible impact your investments have on the causes you care about.

Trusted ESG Data - High quality data is closely examined and transformed into numerical scores assigned to each security. This data is both inclusive and exclusive. We source data from large data-sources like Thomson Reuters, as well as trusted issue-matter experts.

Tax Optimization - Best in-class tax optimization practices to optimize for trade-off tracking error, tax burden, and ESG impact.

*OpenInvest applies a 0.20% separate management fee to research, select and maintain the individual stock portfolios that are generated. This fee is exclusive of the SOA Wealth management fees.

