

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 | Divest The Prison Industrial Complex |
| Reduce Greenhouse Gas Emissions | Invest in Racial Justice |
| Defund Pipelines On Indigenous Land | Support Refugees |
| Divest From Dark Money | Invest in Ethical Supply Chains |
| Fight Deforestation | Divest From Big Tobacco |
| Reduce Fossil Fuel Producers | Divest From Weapons |
| Divest From All Fossil Fuels | Invest In Women Leaders |
| Heart Healthy | Support Animal Welfare |
| Invest in Companies That Support LGBTQIA+ Employees | 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.

