

Investing 101: Part 5 SRI - Are Ethical Funds Right for You?



Investing: *[verb]* confusing process involving magic and midwifery, in which your money is swept away today with the hopes of producing more money in the future. See *related terms:* dreams, confusion, fees, retirement, and future.

What you'll learn today:

- how to make a difference while investing
- how to know whether ethical funds are right for you

How Do You Know if Ethical Funds Are Right for You?

As you've learned in our other Investing 101 blogs, investing makes sense for anyone who can afford to set aside money.

If you plan to retire tomorrow, and you want to protect the world for today and tomorrow, ethical funds are likely a good choice for you. According to [a VanCity blog](#), socially responsible investing "takes your social, environmental, and ethical values and uses them as a guideline to determine which investments are a good fit for your portfolio."

Putting Your Money Where Your Mouth Is!

If you are concerned with the bigger picture – the way that you can make a difference in the world – then SRI may be just what you need. You can move beyond talking about change and helping those in need. You can put your money where your mouth is and help yourself and others in the process.

Check out these examples of ethical funds that can be part of a socially responsible investing portfolio:



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var metaslider_5164 = function($) { $('#metaslider_5164').addClass('flexslider'); // theme/plugin conflict avoidance $('#metaslider_5164').flexslider({ slideshowSpeed:3000, animation:"fade", controlNav:true, directionNav:true, pauseOnHover:true, direction:"horizontal", reverse:false, animationSpeed:1200, prevText:"", slideshow:true }); }; var timer_metaslider_5164 = function() { var slider = !window.jQuery ? window.setTimeout(timer_metaslider_5164, 100) : !jQuery.isReady ? window.setTimeout(timer_metaslider_5164, 1) : metaslider_5164(window.jQuery); };
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Finding the Right Fit

Ethical funds can fit in both conservative and more aggressive investment strategies. Bring in your investment statements. Sit down and get comfortable. Put your feet up! Let's have an honest chat about your investment goals and whether they align with your personal values and your vision for your future. If your portfolio has room for ethical funds, we can make that happen and we can help you maximize your positive returns and your positive feelings.

Take this survey to see if ethical funds are right for you. Then call your financial advisor to discuss how you can help yourself and others today.

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(function(t,e,s,n){var o,c,i;t.SMCX=t.SMCX||[],e.getElementById(n)||((o=e.getElementsByTagName(s),c=o[o.length-1],i=e.createElement(s),i.type="text/javascript",i.async=!0,i.id=n,i.src=["https:"===location.protocol?"https://":"http://","widget.surveymonkey.com/collect/website/js/uiPTs3H1j5J1w9ZLOiNBvlincgRvrKCGk_2B_2FYgz39jso4tUA1sO2ngd_2Fiq71D6PC8.js"].join(""),c.parentNode.insertBefore(i,c)))(window,document,"script","smcx-sdk"); Create your own user feedback survey
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If you answered yes to most of these questions, socially responsible investing may be a good option for you.

Not everyone fits in boxes, but if you checked "yes" more than 4 times, then ethical funds may be a good choice for you.

It is possible that this survey didn't include questions you want to ask. Reach out to a PenFinancial advisor to learn more about SRI and how ethical funds could help you make a difference in your own life and in the lives of others.

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Your Email (required)

You can review the information and take it in with you to the branch to discuss your options!