

























## Socially Responsible Investing

Socially responsible investing can be a great way to ensure your money is invested according to your values. This form is designed to help you identify what you want to emphasize and deemphasize in your portfolio. Keep in mind, there may not be a mutual fund that meets every one of your criteria. However, this information will help us design a portfolio that is based on your preferences.

### Category Importance

Indicate your level of concern as: <b>V</b> Very Important <b>S</b> Somewhat Important <b>N</b> Not Important	Alcohol	Tobacco	Gambling	Defense/Weapons	Animal Testing	Products/Services	Environment	Human Rights	Labor Relations	Employment/Equality	Community Investment	Proxy Voting
												
Indicate importance here →												

### Investment Preferences

Indicate your preference as: <b>X</b> No Investment <b>P</b> Positive Investment <b>R</b> Restricted Investment <b>NS</b> No Screens	Alcohol	Tobacco	Gambling	Defense/Weapons	Animal Testing	Products/Services	Environment	Human Rights	Labor Relations	Employment/Equality	Community Investment	Proxy Voting
												
Indicate preferences here →												

- **(X) No Investment:** You want funds that will not knowingly invest in any companies with certain specific practices or policies in this issue area.
- **(P) Positive Investment:** You want fund that invest in companies with a positive records in this area.
- **(R) Restricted Investment:** You want funds that have limited holdings in this area. One common limitation allows the fund to only invest up to a set percentage of its invested assets in companies with certain practices or policies e.g., a Wire company that has 1% of revenue tied to Defense/Weapons because it's wire is used in airplanes.
- **(NS) No Screens:** You want funds with no specific screening policies or practices in this issue area.

SRI categories and symbols in the tables above are from [Social Investment Forum's Mutual Fund Chart](#)