



Socially Responsible Investing

**ALIGNING YOUR FAITH
& YOUR FINANCES**

Aligning Your Faith & Your Finances

Standing behind our Socially Responsible Portfolios is a committed team dedicated to helping make sure your money is invested, managed and monitored responsibly and with the utmost integrity.

Remember that the most important member of your team is your financial advisor. Your advisor can help you create a clear pathway to your goals by providing personalized financial solutions that take into account all aspects of your financial goals. Above all, your advisor provides guidance, clarity of thought and expertise to help you gain confidence in a more secure financial future.

When it comes to your finances, some things are too important to compromise. When you align your values with your investments, the potential to make a difference is enormous — for yourself, your values, your community, even the world at large.



A photograph of two women in an office environment, overlaid with a semi-transparent blue filter. The woman on the left is smiling and pointing her finger at a document on a table. The woman on the right is looking at the same document. The background is slightly blurred, showing office shelves and equipment.

Are you concerned about what kinds of companies make up your investment portfolio?

Do you wish you could find a way to invest only in companies whose business practices are in line with your beliefs and values?

TAKING A LONG-TERM, SOCIALLY RESPONSIBLE APPROACH TO INVESTING

As a socially responsible investor, one of the biggest challenges you face is identifying companies that align with your values...and those that don't. This can be a daunting task if you try to go it alone.

That's why Buckingham Strategic Partners (BSP) has created a series of seven Socially Responsible Investing (SRI) Portfolios. These portfolios employ a rigorous screening process to ensure that you are only invested in companies whose activities accord with your values and beliefs. With these portfolios, you can be confident that your money will not be invested in companies that:

- Earn at least 20% of their total business revenue through the production and/or sale of military weapons and/or weapons of mass destruction.
- Engage in certain for-profit business activities in or with the Republic of the Sudan.
- Earn at least 15% of their total business revenue through the production and/or sale of tobacco or alcohol products.
- Earn at least 20% of their total business revenue from gambling activities.
- Directly participate in abortions.
- Manufacture pharmaceuticals, abortive agents or contraceptives.
- Are involved in stem cell research.
- Earn at least 15% of their total business revenue from the rental, sale, distribution or production of pornographic materials or the ownership or operation of adult entertainment establishments.
- Are for-profit health care providers.
- Have had major recent controversies relating to child labor infractions in the U.S. or abroad.



Making informed decisions on where — or where not — to invest your money is crucial to helping ensure that your financial plan is in line with your most deeply held values and goals.

But it is also important to invest your money using a disciplined and prudent process. Some investors believe that SRI portfolios can compromise performance. Our research has found that this doesn't necessarily have to be the case.

All Buckingham Strategic Partners SRI portfolios are built using:

- More than nine decades of data, analysis and research.
- Insights from behavioral finance.
- Close relationships with leading academics.

While traditional investment managers strive to beat the market by attempting to predict the future, BSP prefers to set guesswork aside and focus instead on putting the long-term growth potential of global markets to work for you.

Though Buckingham Strategic Partners SRI Portfolios vary in terms of composition and asset class weighting, they all seek to:

✓ **Keep Costs Low** ✓ **Minimize Taxes** ✓ **Control Risks**

The end result: a portfolio designed to serve your values with the goal of delivering expected rates of return for your chosen level of risk.

For more details on the individual SRI portfolios, including fact sheets and performance summaries, talk to your financial advisor.

ABOUT BUCKINGHAM STRATEGIC PARTNERS

Buckingham Strategic Partners acts as the portfolio manager for your Socially Responsible Investing Portfolio. For more than 25 years, BSP has championed a framework for strategic investing that is evidence-based, consistent, and above all, based on decades of research and innovation. Passion and integrity are at the heart of the firm's values, actions and culture.

All Buckingham Strategic Partners SRI portfolios are built predominately with low-cost, institutional class funds from noted money manager Dimensional Fund Advisors (DFA), a firm widely acknowledged for its practical — and innovative — applications of academic financial research. SRI portfolios typically combine over 11,000 securities from all eligible countries and multiple asset classes. The SRI portfolios are designed to capture the power of global markets within a framework that serves the values and needs of religious organizations, charities, foundations and people of faith nationwide.



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All investments involve risk, including the loss of principal. There is no guarantee that the SRI Portfolios referenced in this brochure will achieve their intended objectives.

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