



SOCIALLY RESPONSIBLE INVESTING WITH SJS

WHAT'S IMPORTANT TO YOU IS IMPORTANT TO US

Your institution has a mission, values, and legacy that you want your portfolio to exemplify. At SJS, we help align investment management with your principles, working with you to build a socially responsible investment (SRI) portfolio. **With the priority of not sacrificing your returns or convictions**, we help align your portfolio with your financial obligations and socially responsible investing preferences.

We help create a well-diversified portfolio,* **strategically designed to emphasize market areas that may offer higher expected return potential**. We also partner with leading firms to provide top-tier screening criteria and implementation. Portfolios follow your SRI guidelines while helping to maximize diversification and manage costs, in whatever investment vehicle fits your needs, including:

- Institutional-class mutual funds
- Exchange traded funds (ETFs)
- Separately management accounts

** Diversification does not assure a profit or protect against a loss.
Past performance is no guarantee of future results.*

COMMON QUESTIONS

- Who understands us and our mission?
- How do we live up to our values while striving for the returns we need?
- How can we emphasize investments that align with our convictions?
- Can we invest in businesses whose practices promote the common good?
- Will our SRI portfolio expose us to too much risk?

HOW WE HELP

Our Registered Investment Advisory (RIA) firm implements customized investment screens, such as social, environmental, and governance issues, where possible to align your portfolio with your institution's mission. Screens can be implemented at any level, such as company, industry, or sector, based on the issues you care about most.

The investment managers in which your portfolio is invested may engage with companies on your behalf to promote business practices aligned for the common good by proxy voting and corporate engagement.

DECADES OF EXPERIENCE

SJS manages dozens of SRI portfolios for clients and has been with them every step of the way:

- Have drafted investment policies that include SRI mandates for the past 20+ years
- Apply retail and institutional-class mutual funds that comply with SRI guidelines
- Collaborate with an institutional money manager on additional funds with SRI guideline screening, which has led to helping seed the newly launched screened mutual funds
- Investment professionals on staff with experience in shareholder activism
- Assist clients who express a desire to actively vote their own proxies with drafting proxy voting guidelines and policies
- Participate on a Separately Managed Account Advisory Council to co-think the best ways to build out custom SRI solutions to fit client needs

SERVICES

- Investment policy statement (IPS) review
- Asset allocation analysis
- Investment management
- Socially responsible investing guidelines
- Cash flow management
- Risk management

How Can We Help You?

Contact us to discuss your situation.

SJS Investment Services | sjsinvest.com | 419.885.2626

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