Addressing Climate Change and Social Justice Through Sustainable Investing

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• Presented by:

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  (National Dayenu -- https://dayenu.org/climateinvest/)

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MYTHS

My small investments won’t make a difference…

I can’t earn as much if I move my money…

I have to include the energy sector in my portfolio to earn enough…

It’s too risky….
FACTS

- Investments are a part of everyone’s carbon footprint
- Sustainable funds can match or outperform many conventional funds
- Sustainable investing encourages more socially just corporate practices (tzedek)
- Sustainable investing is growing fast (53% growth from 2020-2021)
- Avoiding fossil fuels makes your portfolio less volatile (less risky)
Where do You start? - Start where you are!
Begin With Your Values

What do you care about?

What impact do you want to have?

What are your hopes for your sustainable investing?
Which first steps are best for you?

- Move to a climate-friendly bank
- Assess your SI Baseline
- Ask for changes in your retirement fund
- Discuss your goals w/ a financial advisor
- Change some of your portfolio’s Assets
- Choose your SI goals / targets
Share and Discuss in your Breakout Rooms

- Values / Motivations
- First Steps
- Obstacles & Solutions
- Goals & Actions

Come back with insights and inspirations to share...
Insights and Inspirations – What Moved You?

Which values motivate you the most?
Which first steps will you take?
What holds you back / will keep you going?
Examples of SMART goals?
RESOURCE SLIDES FOLLOW

"Justice, Justice you shall pursue"
“Taking Stock” Tools and Information:

Tools to Evaluate various funds across issue areas
https://www.fossilfreefunds.org
https://www.i
https://www.asyousow.org/invest-your-values

Online Basic Sustainable Investing Class
http://www.ussif.org/sribasics

Funds List from The Forum for Sustainable and Responsible Investment
http://charts.ussif.org/mfpc/

Information and Reports on Sustainable Investing
http://www.ussif.org/performance

Directory of Planners/Advisors and Firms
http://www.ussif.org/AF_MemberDirectory.asp
Mutual Fund Resources:

- **Deforestation Free Funds**, which may be of interest if you are concerned about rainforest destruction and the palm oil exposure of funds.
- **Gun Free Funds**, which shows how your money might be invested in gun manufacturers and gun retailers.
- **Gender Equality Funds**, which screens funds using company performance on 12 key gender equality indicators.
- **Weapon Free Funds**, which shows how your money might be invested in weapons of war.
- **Tobacco Free Funds**, which shows if your fund has tobacco companies, and if they are promoting tobacco to kids.
- Switch funds to better options use the [online list of mutual funds and ETFs offered by members of US SIF](#).
- Review the [globe ratings from Morningstar](#), and the [Heart Ratings from Natural Investments](#) to learn about the sustainability attributes of your funds.
• Dayenu – A Jewish Call To Climate Action  https://dayenu.org/
• As You Sow  https://www.asyousow.org/
• Invest Your Values  https://investyourvalues.org/
• Green America: Socially Responsible Investing  https://www.greenamerica.org/socially-responsible-investing