

Responsible Investing Is Good Business

A conversation waiting to happen

Responsible Investing can help make the world a better place, allow clients to align their values and portfolios without sacrificing performance, AND present a significant opportunity for the growth and success of your practice.



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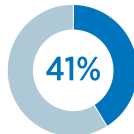
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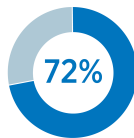
A missed connection

If you're not discussing Responsible Investing with your clients, are you at risk of losing those relationships to someone who will?

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HNW **advisors** who do not currently use ESG/SRI investments and have no plans to use them ¹




HNW **investors** who invest or are interested in impact investing and have not discussed it with their advisor ²

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Sources:

1. Cerulli Associates in "Understanding the Affluent and High-NetWorth Market," Investments & Wealth Research Focus Research Series, Issue 5, 2018, Investments & Wealth Institute.

2. U.S. Trust. 2017 U.S. Trust Insights on Wealth and Worth® Survey, Detailed Findings, page 72.

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