



# Investing With Purpose

## EMPOWER WOMEN



### Things to Consider When Implementing Impact Investing

1. **Alignment of values**- Do your potential investment strategies align with your values?
2. **Approach**- With your values in mind, what investment strategy is best to achieve the greatest impact and financial gain?
3. **Ranking**- Take your values and rank them. This will help define which has the highest importance when it comes to investing.
4. **Investment Philosophy**- Are the core beliefs consistent in the portfolio?
5. **Portfolio Costs**- How will the impact investment strategies affect the portfolio management costs?
6. **Tax Costs**- What are the possible tax costs when implementing impact investing strategies?

We were extremely fortunate to have Sarah Hinman, CPA/PFS, CFP®, lead our March 9th event on investing with a purpose. Over the past few decades, Impact investing has been gaining in popularity and Sarah offered up some great advice about the key areas that are necessary to understanding this type of investment.

### What is impact investing?

Impact investing refers to investing in specific companies to create a measurable social and environmental impact while also benefiting from a financial return. Impact investing uses value-based priorities to guide you in your decision-making.

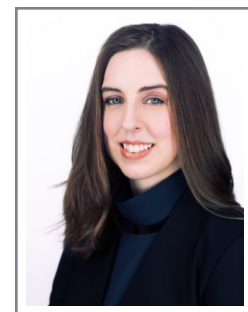
### Define your values

When you begin to consider how and where you want to invest your money, you should start with your values. Create a list and prioritize them. This will help you visualize and define what's

most important to you when it comes to where you would like to have the most impact. Examples of values could be climate action, ocean conservation, social injustice or sustainability.

### Work with an advisor

Always consult with your advisor. You can discuss with them specifically how you want your money invested. They can research companies to determine whether their practices align with your values or not. They will also evaluate different approaches to give you the best possible outcome.



**Sarah Hinman**  
CPA, PFS, CFP®

