

SVA Plumb Financial – Money Minute: The 5 Phases of Socially Responsible Investing

Socially responsible investing, investing with impact, value based investing, they all have the same goal - investing your dollars in ways that positively impact our world. When you're ready to embark into the world of SRI, use these five phases to help you develop and assess your SRI footprint.

Number one, exploration. Take the time to understand what impact investing is and what options are available through your investment advisor.

Number two, assess. Review your current portfolio to see if your choices reflect the sense of identity and values. Understand how existing investments meet your needs or what changes can be made.

Number three, strategize. Research what kind of investments provide the impact that matches your values and meet your objectives.

Number four, invest. Consult your financial advisor for guidance on SRI investments available to you.

Number five, review. After the appropriate length of time, assess your choices to see if your objectives, objectives are being met.

Are you ready to get started? SVA Plumb Financial is here to help you create your SRI footprint.