

INVESTING WITH PURPOSE

Whether you want to align your portfolio with your values or make an impact on a cause you care about, we can help you invest with purpose.

RAYMOND JAMES

For clients who want to build a better world, starting with their own portfolios

Sustainable investing considers a wide range of personal values and environmental, social and corporate governance criteria as part of the investment selection process.

SUSTAINABLE INVESTING MAY BE RIGHT FOR YOU IF…

- You want to **make a positive societal impact**. We can connect you to meaningful opportunities where investment dollars can back businesses and communities that are making a difference.
- You want your portfolio to **reflect your values**. Whether your values stem from your faith, family or life experiences, we can help you invest in companies whose practices align with your moral compass.
- You want to **mitigate risk.** Environmental degradation, data breaches and other sustainability considerations can impact a company's bottom line. We can help lessen risk with thorough research and analysis.
- You want to **invest in economic opportunities**. From renewable energy to artificial intelligence to water technologies, we can help you find options to invest in the innovations of tomorrow.

$6.5 trillion

(12% of the US market size) invested in sustainable strategies in the US in 2024

Source: US SIF Trends Report 2024

TAILORED STRATEGIES

Working closely with us, you can tailor a portfolio of any size to promote the kind of world you'd like to see.

Our sustainable investment strategies vary based on different client motivations. Because there is no "one size fits all" approach, we focus on understanding your preferences and values so that we can find the right mix of strategies that complement your goals.



Exclusionary screens: Filtering out sectors or business practices that do not align with your values.



Economic opportunity and risk factors: Evaluating material risks and opportunities for long-term sustainability and financial wellbeing.



Faith and values alignment: Choosing investments that match your personal or religious beliefs.



Impact measurement: Generate positive social or environmental outcomes and a financial return.

$100 billion

Invested in faith-based funds and ETFs globally in 2023

Source: Morningstar

YOUR PRINCIPLES, YOUR PORTFOLIO

Aligning your wealth and values is a deeply personal journey, and our platform reflects that. We have the tools to build a portfolio that is a reflection of you – your beliefs, preferences and goals – making every portfolio as distinct as the person behind it.



SUSTAINABLE INVESTING IN ACTION

David and Ellen are passionate about food security and access to quality, organic food. They invest a portion of their portfolio in companies that donate to organizations working to end hunger and involve small-scale farmers in their supply chains. Health and well-being are also important to their daughter, Hannah, who is a dietician and will inherit her parents' wealth in the future. Her current portfolio excludes companies that produce alcohol and tobacco.

This is a hypothetical example for illustration purposes only and does not represent an actual investment.

141 New sustainable funds launched between 2020 and 2022

Source: Morningstar



Ready to make an impact?

Through a deeper understanding of what matters to you, we can help you build a different kind of portfolio – one with impact.

LIFE WELL PLANNED.

RAYMOND JAMES®

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Sustainable investing may incorporate criteria beyond traditional financial information into the investment selection process. This could result in investment performance deviating from other investment strategies or broad market benchmarks. Please review any offering or other informational material available for any investment or investment strategy that incorporates sustainable investing criteria and consult your financial professional prior to investing.

Investment products are: not deposits, not FDIC/NCUA insured, not insured by any government agency, not bank guaranteed, subject to risk and may lose value.

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