

# Values Inventory: Questions to consider



Extremely important

Somewhat important

Not a focus

## How important is each of the following to you?

Avoiding companies whose products and practices harm others

Seeking companies whose products and practices help create a better world

Seeking out fund managers who actively engage with companies in the portfolio

## Which values are important to you?

### Promoting family and community

by helping meet the credit needs of low income communities

(e.g. community reinvestment bonds)

by avoiding pornography & explicit entertainment

by avoiding industries that enable human trafficking

### Respecting the value and freedom of all people

by avoiding alcohol

by avoiding gambling

by avoiding tobacco

### Valuing the right to life at all stages

by avoiding abortive/contraceptives/stem cell

by avoiding controversial weapons

by avoiding military contracting

### Practicing environmental stewardship

by pursuing sustainable corporate initiatives (e.g. green bonds)

by pursuing sustainable practices relative to peers

by reducing industry exposures related to environmental harm or controversy

(e.g., thermal coal, pesticides, GMOs, palm oil, fossil fuels)

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