

Socially Responsible Investing (SRI)

Positive Impact.

The portfolio seeks to make a positive impact on the world by investing in companies that focus on sustainable living, social advancement, and the environment, while striving to achieve long-term results.

Competitive Returns.

Research has shown that investing in disruptive companies with a socially responsible focus can potentially increase returns while providing a better future for everyone.

Diversified Portfolio.

A diversified portfolio of exchange-traded funds focusing on socially responsible investing. The portfolio is monitored by our investment committee as they always look for additional opportunities to make a positive impact on the world.

Your Investment Impact

The SRI Portfolio invests in global companies that are making a positive impact in our world while maintaining a diversified approach. Your impact includes:

Sustainable Living



Health



Affordable Housing



Agriculture

Social Advancement



Living Wages



Gender Equality



Education

Environment



Clean Energy



Alternative
Resources



Resource
Management

Disclosure: There is no guarantee that any investment strategy will achieve its objectives, generate profits, or avoid losses.

List of Funds:

Fund	Symbol	Description
iShares ESG 1-5 Year Corp Bond	SUSB	The fund invests in corporate bonds issued by companies that have positive environmental, social and governance characteristics.
Nuveen ESG High Yield Corp Bond	NUHY	The fund invests in high yield corporate bonds that satisfy certain environmental, social and governance criteria.
RBC Impact Bond Fund	RIBIX	Disciplined fixed income investing designed to deliver both financial and social return, combining an established fixed income strategy with measurable positive social outcomes.
Hartford Global Impact	HGXAX	A fund that invests in companies whose core business addresses the world's major social and environmental challenges.
Calvert Equity Fund	CSIEX	A US equity fund using the Calvert Principles for Responsible Investment framework in evaluation and as a guide for active engagement efforts with company managements.
Parnassus Mid-Cap	PARMX	A US mid-cap fund investing in companies with long term competitive advantages and positive performance on ESG criteria.

Important Information and Disclosures

Advisory services offered through Berger Financial Group, Inc., a Registered Investment Advisor.

There is no guarantee that this strategy will achieve its investment goal. An investment in the strategy is subject to risk, including the possible loss of the principal amount invested. The strategy is subject to the risk of a decline in the value of its underlying stocks. Other risks include those associated with asset class, concentration, currency, financial sector, leveraging, liquidity, management, market, market trading and non-diversification risk.

The model advertised herein is not designed based on the individual needs of any one specific client or investor. In other words, it is not a customized strategy designed on the specific financial circumstances of the client.

This strategy may not be suitable for all investors. A full list of current holdings will be provided upon request.