

# AffirmativESG

## The Future of Environmental, Social, and Governance Investing

ESG stands for **environmental, social, and governance**. This burgeoning investment discipline considers environmental, social and corporate governance (ESG) criteria to generate long-term competitive financial returns and positive societal impact.

### The First of Its Kind

At First Affirmative Financial Network, we are dedicated to the belief in the power of capital to bring lasting environmental and social change. Our new advisor workstation, **AffirmativESG**, is the latest manifestation of this philosophy. It is an advisor-driven digital wealth management platform that integrates advisor guidance with First Affirmative's unparalleled research and portfolio construction expertise. This breakthrough platform allows for the creation of entirely customizable portfolios to meet unique financial and impact objectives.

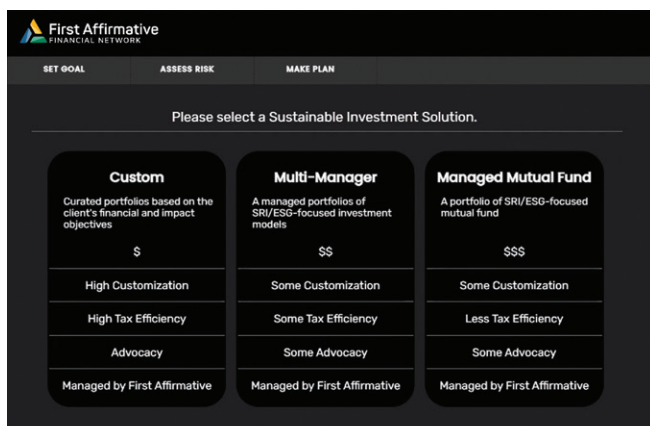
### An Unmatched Level of ESG Customization

How do you want to change the world? With over 50 client impact preferences categories available, your portfolio can be fully customized to meet your individual environmental, ethical, and social objectives. Include or exclude securities from the following major categories:

- ✓ Animal Rights
- ✓ Fossil Fuels
- ✓ Renewable Energy
- ✓ Other Environmental Issues
- ✓ Corporate Behavior
- ✓ Culture & Behavior
- ✓ Military and Weapons
- ✓ Racial Equity

### Three Distinct Outcome-oriented Strategies

Our proprietary Sustainable Investment Solutions are powered by First Affirmative's research, analytics, and due diligence expertise. AffirmativESG delivers three distinct outcome-oriented strategies, each crafted by our clear, consistent, and repeatable investment process.



SET GOAL	ASSESS RISK	MAKE PLAN
Please select a Sustainable Investment Solution.		
<b>Custom</b> Curated portfolios based on the client's financial and impact objectives \$ High Customization High Tax Efficiency Advocacy Managed by First Affirmative	<b>Multi-Manager</b> A managed portfolio of SRI/ESG-focused investment models \$\$ Some Customization Some Tax Efficiency Some Advocacy Managed by First Affirmative	<b>Managed Mutual Fund</b> A portfolio of SRI/ESG-focused mutual fund \$\$\$ Some Customization Less Tax Efficiency Some Advocacy Managed by First Affirmative

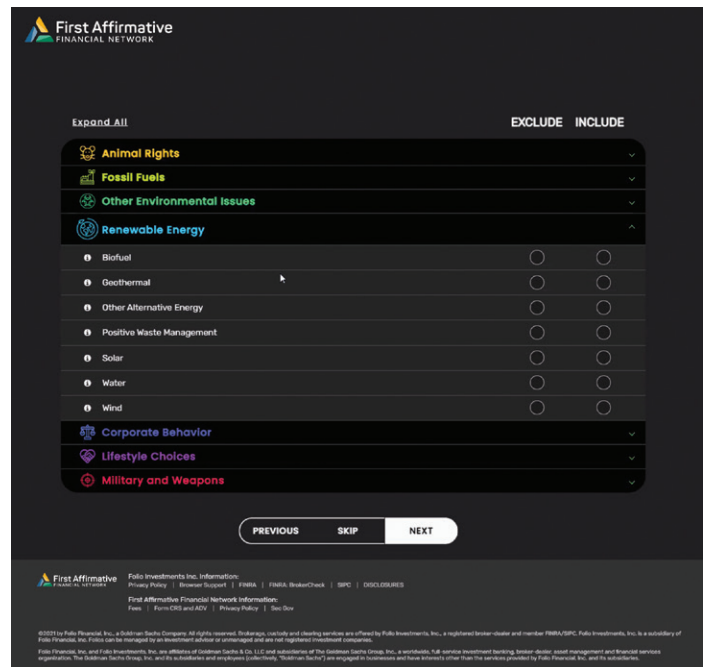
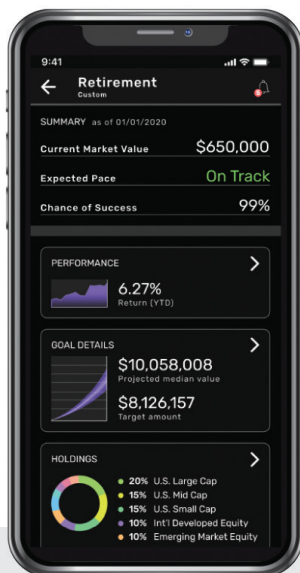
**Custom Sustainable Investment Solution:** Curated portfolios of individual equities and fixed income securities that specifically reflect the individual client's values, ethical preferences, and financial objectives.

**Multi-Manager Account:** Carefully chosen investment models that integrate ESG criteria into the investment analysis and selection process

**Managed Mutual Fund:** A portfolio of mutual funds that integrate ESG criteria into the investment analysis and selection process.

## Tomorrow's Technology, Delivered Today

- ✓ Customization across a range of inputs, including risk tolerance and time horizon, in addition to ESG concerns;
- ✓ Goals-based financial planning, whether it is saving for retirement, a major purchase, or a child's education, or simply building wealth;
- ✓ Automated portfolio construction, IPS generation, reporting, and more;
- ✓ Tax optimization, including tax-lot-relief strategies designed to support a wide range of needs, as well as targeted tax gains or losses; and
- ✓ Enhanced trading capabilities, including fractional shares and dollar-based investing.



## The Connected Advice Model, Technology Necessary for Today

- ✓ Reduce or even eliminate paper waste with our completely paperless, automated account opening process.
- ✓ Utilize the platform's advanced co-browsing capabilities for advisor and client meetings.
- ✓ Access to portfolios anywhere, anytime through our mobile app, downloadable for iOS or Android devices.



Contact a member of our sales team today to learn more and connect with an First Affirmative advisor.

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**First Affirmative is a pioneer in the SRI advisory space.** For over 30 years, we've been helping advisors grow their practices leveraging sustainable, responsible, and impact (SRI) investing principles. We are proud to serve our advisors and their clients with the highest fiduciary standards as we help them create investment solutions designed to meet both financial and impact goals. Visit [firstaffirmative.com](https://firstaffirmative.com) to learn more about us.

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Past performance is no guarantee of future results. All investment programs entail investment risk. Any investment portfolio is subject to fluctuation in market value and when redeemed, may be worth more or less than the original investment.