

VADIS

Values-Aligned Direct Index Solution

TRANSPARENT, SUSTAINABLE INVESTING

VADIS helps you align your investments with your values to ensure you are investing in the sustainable future you envision. Every investable dollar has the potential to make the world a better place.

TRANSPARENCY AND SUSTAINABILITY ARE THE GOAL

VADIS is the transparent way for you and your advisor to assess risk and incorporate your specific impact preferences into a portfolio optimized to meet your individual financial and impact goals. Before opening an account, a customized portfolio will be built to ensure your investment dollars are reaching exactly where your values and interests reside. You also have access to proxy voting and advocacy programs to maximize the impact of your share ownership.

YourStake Company Screener

The YourStake Company Screener enables the advisor to create an Expanded Impact Preferences List to fully reflect the client's values and environmental, social, and ethical preferences

If a company is included on a specific list, it is "flagged"

- All companies with negative flags are removed from the Client-Specific Investment Universe.
- This client chose to incorporate many expansive exclusionary categories such as Animal Exploitation, Deforestation, Fossil Fuel Industry Exposure, Migrant Detention Involvement, Prison Industry Exposure, Tobacco Producer Exposure, and Weapon Industry Exposure.



With VADIS, you and your advisor will work together to identify the companies with **environmental, ethical, social and governance agendas** aligned with your own. You can implement specific filters geared toward **climate change, Diversity, Equity, and Inclusion (DEI), animal welfare, fossil fuel exposure, lifestyle choices, or military and weapons**. If a company is or is not aligned with your impact preferences, you and your advisor can include or exclude it, giving you control over how your portfolio is customized. And, more importantly, how your investments are having **a greater impact**.

WHAT IS A DIRECT INDEX SOLUTION?

A direct index solution attempts to replicate the performance of an index by purchasing a subset of its underlying individual equities.

First Affirmative Financial Network has added another layer to align these choices with your personal values, interests, and passions. You can now match your financial goals with your core values with **VADIS, a first-of-its-kind direct indexing solution.**

While most companies only make direct index solutions available to high-end investors, we felt the threshold shouldn't be out of reach for the mainstream investor.

With VADIS, your advisor can now help you create a customized portfolio with a full understanding of your investment choices. Our team provides detailed insights so you and your advisor can make educated choices based on real data. **Be sure to talk to your advisor about the affect of Impact Preferences on the overall diversity of your portfolio.**

You no longer have to sacrifice your values for your financial goals.

ALIGNING YOUR VALUES AND YOUR INVESTMENT PORTFOLIO IS SIMPLE WITH VADIS

VADIS can take your investing strategy to a new level, one that brings together all the elements for impact – values, investment, and ESG.

- **Customized** to meet your financial goals
- **Enhanced relationship** with your advisor through easier monitoring, meetings, and engagement
- **Your personal values** focused to create a customized portfolio with Environmental, Social, Governance (ESG) preferences



**CONTACT YOUR ADVISOR TO LEARN MORE ABOUT VADIS,
A FIRST AFFIRMATIVE FINANCIAL NETWORK PRODUCT, AND HOW IT CAN
HELP YOU INVEST IN YOUR SUSTAINABLE FUTURE.**



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First Affirmative is a pioneer in the ESG/SRI advisory space. For over 30 years, we've been helping clients and their advisors leverage sustainable, responsible, and impact (SRI) investing principles. We are proud to offer the highest fiduciary standards as we help our clients create investment solutions designed to meet both financial and impact goals.

First Affirmative receives a soft dollar benefit for accounts using Apex Clearing as Custodian of client assets. First Affirmative has agreements with several custodians with different functionality and costs. Advisors and Clients decide which custodian to use based on services they need and not on any monetary benefit to the firm. For more information, please see our ADV Brochure available on our website.



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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.