

VADIS Persona Portfolio: Planet Protector

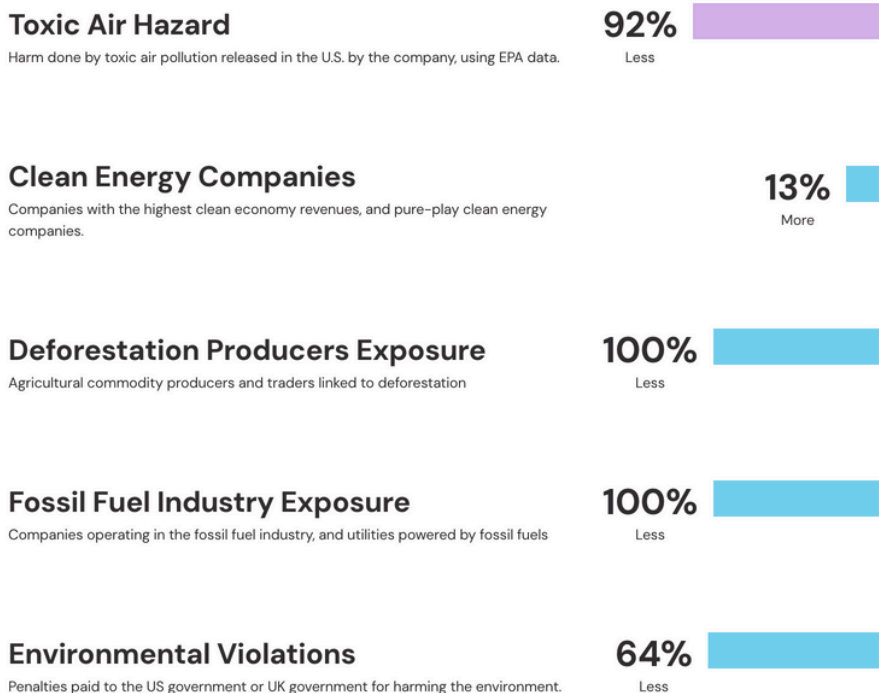


VADIS for the Planet Protector

One personality type clients often align with through the **Behavioral Values Questionnaire** is the Planet Protector Persona.

This Persona consists of metrics focused on GHG emissions, Toxic Water, Fossil Fuel Industry Exposure, Clean Energy Companies, and Deforestation Exposure.

This persona can be used as-is, or modified to fit a client's particular focus, while helping maximize returns and multiplying your clients' impact with authenticity, customization, and transparency



The example shown is the YourStake comparison report of the VADIS-optimized Planet Protector Portfolio with moderately aggressive risk tolerance against the S&P500.

Why VADIS?

3 Ways to Implement VADIS



Persona Portfolios



Firm Values



Bespoke Customization

VADIS vs. Other Direct Indexing Solutions

- ✓ **Over 150 metrics** split across 5 key issue areas for customization (vs. 5-10)
- ✓ Investment Minimum: **\$25k** on Apex, \$250k on Schwab (vs. \$100k+)
- ✓ Management fees from **0.36%** (vs. 0.50%+)
- ✓ Innovative, **Advisor-centric** platform using the latest technologies