Create Your Own: Mini Ethical Investment Policy

THE CURVE

Step 1

Discover your values, ask yourself...

What are things I refuse to compromise on:

What are qualities I really admire in other people:

What are things about myself I'm really proud of:

What are qualities of mine people often compliment me on:

Looking at the answers to the left, circle/select values below that align with your answers.

We've taken these from Brene Browns List of Values, go here to download the full list.

Power	Trust
Accountability	Perseverance
Altruism	Job Security
Ambition	Knowledge
Safety	Compassion
Self-discipline	Honesty
Truth	Growth
Wealth	Innovation
Vulnerability	Stewardship
Wholeheartedness	Equity
Openness	Resourcefulness
Family	Service
Financial Security	Tradition
Competence	Uniqueness
Belonging	Nature
Beauty	Making a difference
Adventure	Peace
Harmony	Security
Humour	Connectedness
Creativity	Community
Success	Animal welfare
Empathy	Freedom

Step 2:

Now that you're clearer on the things you value, what kind of activities or industries don't align with these?

This could help shape your list of 'things I'm aiming to avoid'

I.e If you value community you might want to avoid investing in tobacco and vape products because you think it causes harm to society. If you value animal welfare, you might want to avoid products that test on animals without consideration for their welfare.

Step 3:

What do I want to elevate or help grow?

Considering your values, what are things you might like to support and/or would feel proud or comfortable making money from?

If you can't think of anything – consider taking your values and avoid list to an adviser to get support with where to invest.

I.e If you really value protecting nature, you might want to seek out some Green Bonds or companies involved in renewable energy. If you value innovation, you might like to look at cutting-edge technology companies or Managed Funds that hold innovative private assets.

Pathfinder™