

Ethical Investing

By Ross Turnbull, CPA, CA, CBV, CFA | Vice President, Director, Portfolio Manager

Ethical investing, also referred to as socially responsible or community values investing, seeks to maximize both financial return and social good.

When you buy shares of a corporation, you become a part owner of that enterprise. Your invested capital is used to fund the business and generate a return to you, the shareholder. Many investors want to ensure that they are ethically comfortable with the companies their capital is funding.

Typical screens that investors apply include impact on the environment, impact on health (such as cigarette companies) and impact on humanity or society (such as arms manufacturers). The continuum of issues and sensitivities is personal to you and your situation. While there tends to be widespread agreement among ethical investors that tobacco companies and arms manufacturers are to be avoided, the issues related to other businesses such as big-box retailers, energy companies or pharmaceutical companies are nuanced and personal.

Ethical investing is also about investing capital into businesses that are perceived to be making a positive change. For example, there are exciting technologies related to renewable energy that may become profitable investments. There are also businesses that lead in areas of social responsibility, community engagement, conservation, and corporate governance.

Creating a portfolio that meets both your financial and social objectives starts with a conversation about your priorities. If you desire to invest in ethically progressive businesses, I will strive to identify profitable investment opportunities in those types of companies. If you object to a specific company or business, we will not invest in it.

For more information, please contact:

Ross Turnbull, CPA, CA, CBV, CFA

Vice President, Director, Portfolio Manager

Phone: (604) 844-5363 | Toll-Free: (888) 886-3586 | rturnbull@odlumbrown.com

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