

BRI MANAGER MARKETPLACE ISSUE WORKSHEET

Please let us know what's important to you! Mark the issues below that you would like to see addressed in your account. If there are any additional instructions, please indicate those in the notes section.

NAME: _____

DATE: _____

ISSUE EXPOSURE

I would prefer to invest in companies without involvement in the following areas (check all that apply):

Abortion

Abortion assessments evaluate whether a company has involvement in manufacturing or distributing abortifacients or providing elective abortion services.

Alcohol

Alcohol assessments evaluate whether a company has involvement in the alcohol industry including the production of alcoholic beverages, the business to business sale and distribution of alcohol products, or the licensing of brands for the marketing of alcoholic beverages.

Bioethics

Bioethics assessments evaluate whether a company has involvement in embryonic stem cell and/or fetal tissue research.

Contraceptives

Contraceptive assessments evaluate whether a company has involvement in manufacturing or distributing contraceptives, including emergency contraceptives such as Plan B.

Firearms

Firearms assessments evaluate whether a company has involvement in firearms and ammunition manufacturing.

Gambling

Gambling assessments evaluate whether a company has involvement in the gambling industry. This includes operation of casinos, racetracks or other gaming parlors, online gaming sites or the manufacture of gaming equipment.

GLBT

GLBT assessments evaluate whether a company includes sexual orientation in its non-discrimination policy.

Military Weapons

Military weapons assessments evaluate whether a company has involvement in weapons contracting with the U.S. Department of Defense.

Nuclear Power

Nuclear power assessments evaluate whether a company has involvement in the nuclear power industry.

Pornography

Pornography assessments evaluate whether a company has involvement in the adult entertainment industry. This includes production or distribution of sexually explicit publications, motion pictures, television, websites, software or video games, or offering sexually explicit services.

Tobacco

Tobacco assessments evaluate whether a company has involvement in the tobacco industry including the manufacture or wholesale distribution of tobacco products.

COMPARATIVE RATINGS

I would prefer to invest in companies with higher ratings* in the following areas (check all that apply):

Diversity

Diversity ratings evaluate whether a company has women board members and minority board members.

Environment

Environmental ratings evaluate company environmental performance in managing its toxic chemical releases, toxic chemical waste production, oil and chemical spills, and environmental fines.

Human Rights

Human rights ratings evaluate a company's exposure to human rights issues based on operations in countries of concern and endorsement of Global Sullivan Principles and the UN Global Compact.

Labor Relations

Labor relations ratings evaluate a company's unionization rate and its strike record.

*Ratings are based on IW Financial's research and Ratings Engine. Within each category, the issues will be equally weighted. Manager evaluations on these topics will present an "average rating" based on the companies included in the model portfolio.

NOTES:

THANK YOU!

