



## **SOCIALLY & ENVIRONMENTALLY RESPONSIBLE INVESTMENT STRATEGIES SINCE 1987**

### **Your Investments Can Do More Than Just Grow**

Progressive Asset Management Network (PAM) is a national network of Financial Advisors who provide investors with a way to invest for competitive financial return and social and environmental progress at the same time. Through our broker-dealer relationship with dealer Financial West Group (FWG), and our custodial and clearing relationships with National Financial Services (a division of Fidelity Investments) and Charles Schwab and Co., we offer a complete range of investment services for individuals, organizations, families and institutions.

### **With Investment Comes Power**

Socially Responsible Investing (SRI) provides a real force for global change. By taking advantage of our investment screening and shareholder advocacy efforts, PAM clients have the opportunity to participate in efforts to exert influence over corporate policies. We help our clients to use their ownership in public companies as a powerful tool to promote economic, social and environmental change. In addition, we offer our clients unique community investment options that can have a direct impact on local communities by providing needed funding for housing, health care, and small business development.

### **Strong Investment Performance**

Many well-intentioned investors have shied away from engaging their values in the investment process due to apprehension about giving up performance results. Over the past 15 years numerous studies have been released which prove this perception wrong. Today, SRI is increasing its influence within the financial community in large part due to the competitive financial returns that socially-screened portfolios have generated. From our perspective, companies that do not follow responsible business and governance practices will tend to have greater charges against earnings due to regulatory violations, litigation, boycotts, and strikes. We believe that social screening can expose hidden risks and liabilities a company faces while also identifying quality management skills that can bolster performance.

## What We Can Do For You

PAM Financial Advisors have at their disposal the broad range of financial services you would expect to find at any respected financial institution. We can help you to:

- Prepare your Strategic Investment Plan, customized to your unique financial and social standards, including Retirement Planning, Education Funding, Estate Planning, and Charitable Gifting
- Apply your personal view of “Social Responsibility” into every investment decision we make or recommend
- Provide Diversified Asset Allocation recommendations that meet your needs for growth, income and safety
- Access the complete range of investment choices, including custom stock and bond portfolios, mutual funds, insurance, and banking services
- Participate in Shareholder Advocacy campaigns and High-Impact Community Investments
- Monitor Your Investment Performance with a Financial Advisor who will honor your values as well as your financial goals

PAM Financial Advisors have the flexibility and resources to address your investment needs both responsibly and creatively.

## Social and Environmental Screening Services for Every Need

Screens can be customized for all of your holdings that will address the issues that are important to you. Some of the more widely-used screens include:

- Environmental Impact
- Corporate Governance and Ethical Practices
- Military Contracting and/or Nuclear Weapons
- Sweatshops, Outsourcing and Fair Labor Practices
- Human Rights and Equal Opportunity
- Tobacco, Alcohol, Gambling and Adult Entertainment
- Relations with Repressive Regimes
- Animal Rights/Product Testing
- Other *(you tell us what’s important to you! Our research covers 22 different issues clients have told us are important to them.)*

[www.ProgressiveAssetManagement.com](http://www.ProgressiveAssetManagement.com)



## JOIN OUR COMMUNITY

Visit our website to learn more about Progressive Asset Management and the complete range of investment services we offer.

## CONTACT US TODAY!

Get started on the path to realizing your financial goals while you help to:

- Clean up the environment
- Build your community
- Change the world!

The PAM Network serves as the socially responsible division of Financial West Group (FWG). Members of the PAM Network are registered representatives of FWG and securities are offered through FWG, a FINRA, SIPC member. FWG is also a Registered Investment Advisor.