



# CenterPoint Financial

Move Forward with Confidence

## Invest with your values

We believe the strategic deployment of private capital can help address the global social, economic and environmental challenges we face today.

Toward this goal, we strongly support our clients' desires to invest according to their environmental and social values.

CenterPoint Financial follows the industry standard of using the [UN Sustainable Development Goals](#) as a guideline in helping our clients prioritize their social investing goals.

World leaders came together in 2015 and made a historic promise to secure the rights and well-being of everyone on a healthy, thriving planet when they adopted the [2030 Agenda for Sustainable Development](#) and its [17 Sustainable Development Goals \(SDGs\)](#). "The Sustainable Development Goals are the blueprint to achieve a better and more sustainable future for all. They address the global challenges we face, including those related to poverty, inequality, climate change, environmental degradation, peace and justice. The 17 Goals are all interconnected, and in order to leave no one behind, it is important that we achieve them all by 2030. The SDGs reflect an understanding that sustainable development everywhere must integrate economic growth, social well-being and environmental protection."

Each year the United Nations releases its annual report to provide an overview of the world's implementation efforts to date, highlighting areas of progress and where more action needs to be taken. These 17 SDGs, and the annual report updating their implementation, are incorporated into the sustainable investment screens used by the investment companies we utilize in managing our clients' investment portfolios.

In order to best understand the greatest social concerns of our clients, and how they align with their financial goals, we use the 17 SDGs. Please review the following goals and identify areas of greatest concern. Please visit the UN Sustainable Development goals [website](#) for more information on any of these priorities.

# SUSTAINABLE DEVELOPMENT GOALS

- **Goal 1: No Poverty** - Economic growth must be inclusive to provide sustainable jobs and promote equality.
- **Goal 2: Zero Hunger** – The food and agriculture sector offers key solutions for development, and is central for hunger and poverty eradication.
- **Goal 3: Good Health and Well-Being** – Ensuring healthy lives and promoting the well-being for all at all ages is essential to sustainable development.
- **Goal 4: Quality Education** – Obtaining a quality education is the foundation to improving people’s lives and sustainable development.
- **Goal 5: Gender Equality** – Gender equality is not only a fundamental human right, but a necessary foundation for a peaceful, prosperous and sustainable world.
- **Goal 6: Clean Water and Sanitation** – Clean, accessible water for all is an essential part of the world we want to live in.
- **Goal 7: Affordable and Clean Energy** – Energy is central to nearly every major challenge and opportunity.
- **Goal 8: Decent Work and Economic Growth** – Sustainable economic growth will require societies to create the conditions that allow people to have quality jobs.
- **Goal 9: Industry, Innovation, and Infrastructure** – Investments in infrastructure are crucial to achieving sustainable development.
- **Goal 10: Reduced Inequalities** – To reduce inequalities, policies should be universal in principle, paying attention to the needs of disadvantaged and marginalized populations.
- **Goal 11: Sustainable Cities and Communities** – There needs to be a future in which cities provide opportunities for all, with access to basic services, energy, housing, transportation and more.
- **Goal 12: Responsible Consumption and Production** – Responsible Production and Consumption
- **Goal 13: Climate Action** – Climate change is a global challenge that affects everyone, everywhere.
- **Goal 14: Life Below Water** – Careful management of this essential global resource is a key feature of a sustainable future.
- **Goal 15: Life on Land** – Sustainably manage forests, combat desertification, halt and reverse land degradation, halt biodiversity loss.
- **Goal 16: Peace, Justice and Strong Institutions** – Access to justice for all, and building effective, accountable institutions at all levels.
- **Goal 17: Partnerships** – Revitalize the global partnership for sustainable development.

<https://www.un.org/sustainabledevelopment/>

**Do you have other social concerns that we should consider in your investments? i.e. weapons or tobacco restrictions.**

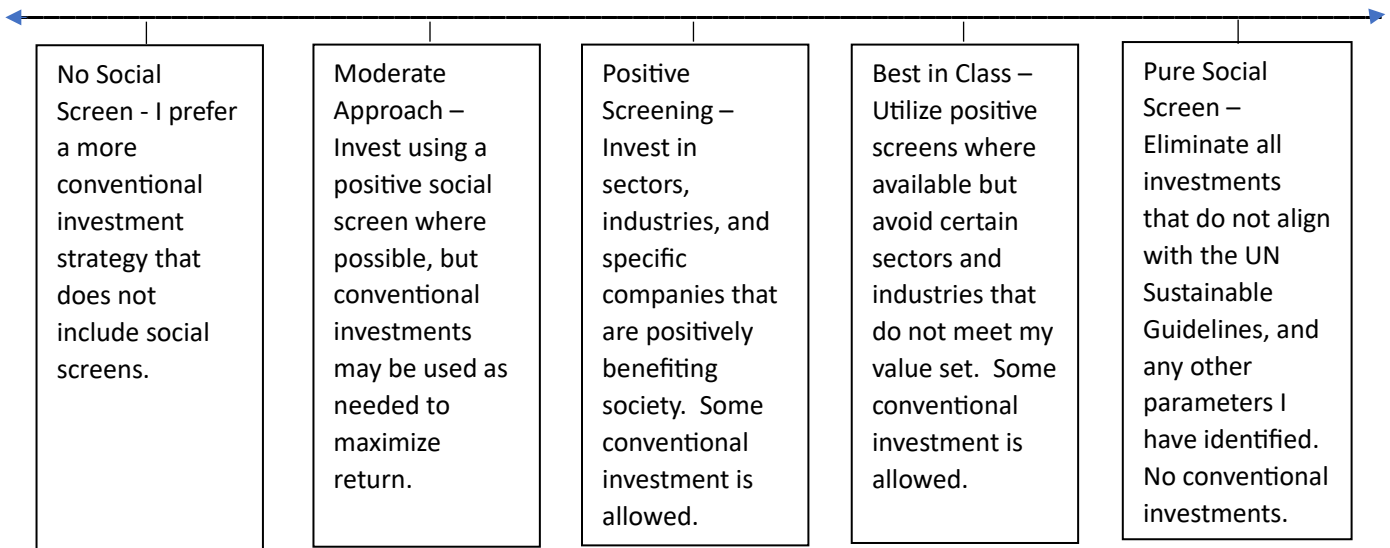
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In considering these various social screens, please evaluate where your social priorities fall along the continuum of integrating screens into your investment strategy. Please circle the strategy that best fits your approach.



Client Name(s): \_\_\_\_\_

Date: \_\_\_\_\_

Signature(s) \_\_\_\_\_