



The Forum for Sustainable and Responsible Investment

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Separate Account Managers in Sustainable and Responsible Investing

Strategy Profile:

Loring Ward Global Portfolio Series Sustainability Equity

About This Strategy

Assets Under Management (AUM): \$0.05M (in US\$ millions)

Required Minimum: --

Benchmark used: Blend: S&P500, MSCI EAFE, BofA ML US Trsy/Agcs AAA 1-3Yr

Strategy type: Balanced Strategys

Strategy description: Loring Ward's Sustainability Investing Global Portfolio Series is designed to meet the needs of investors looking for investments that serve their values and beliefs. The Sustainability portfolios invest in the DFA US Sustainability Core 1 fund and the DFA International Sustainability Core 1 fund. These funds use Environmental Sustainability Ratings by Sustainable Holdings to increase exposure to companies that have high ratings for sustainable practices and reduce or eliminate exposures to companies with low ratings. The rating system evaluates companies on a defined set of environmental sustainability practices*. (*Source: Environmental Sustainability Ratings by Sustainable Holdings and Esty Environmental Partners)

The DFA Funds are sponsored by Dimensional Fund Advisors and distributed by DFA Securities LLC. Consider the investment objectives, risks, charges and expenses of the DFA Funds carefully before investing. The prospectus and if available, summary prospectus, contain this and other information about the DFA Funds. To obtain a prospectus, summary prospectus, additional information about the DFA Funds, or performance data current to the most recent month-end, please call Dimensional Fund Advisors collect at 512-306-7400. Please read the prospectus and summary prospectus carefully before investing.

Strategy web link: [External Link](#)

About The Company

Institution Name:

LWI Financial Inc. (Loring Ward)

Approach to Sustainable & Responsible Investment: LWI Financial Inc. (Loring Ward) is an investment adviser registered with the Securities and Exchange Commission. Securities transactions are offered through its affiliate, Loring Ward Securities Inc., member FINRA/SIPC. IRN B 13-064 (Exp 6/15)

Total AUM in SRI: \$5.2M (in US\$ millions)

Research conducted: Externally

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Specific Screening Information by Category

Environment

- **Climate / Clean Technology:** *Positive Investment* - Reducing resource consumption: sustainable companies are efficient in their use of natural resources - particularly non-renewable resources and energy that contribute to global climate change.
- **Pollution / Toxics:** *Positive Investment* - Reducing emissions of toxics and pollutants: companies that emit harmful chemicals, break environmental laws, or show wanton disregard for local environments are not performing sustainably.
- **Other Environmental:** *Positive Investment* - Implementing productive environmental management systems and initiatives: Embedding environmental thinking into the business structure maximizes sustainability thinking at every point, rather than only after the fact. Helping customers achieve sustainability: Thinking beyond the walls of the company to design products that reduce the environmental impacts during product use is a key aspect of sustainability.

Social

Governance

Products

Other