

“The Growing Importance of Socially Responsible Investing (SRI) to Planned Giving. What Non-Profits, and Allied Professionals Need to Know to Attract Major and Planned Gifts from Individual Donors Who Want to Align Their Investment Objectives with Their Personal Values”

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As more and more philanthropists (including the growing Millennial population) are turning towards Socially Responsible Investing (SRI), also known as ESG (Environmental, Social and Governance Criteria), to align their investment portfolios with their personal values, Non-Profits too will want to align their investment portfolios with their missions in order to attract those donors.

In 2016, ESG investable assets climbed to \$8.72 trillion in the United States – a 33% increase from 2014. Currently, approximately \$1 or over \$5 dollars invested has some Socially Responsible Investing/Environmental, Social, Governance mandate. While there are some investors who prefer not to invest in companies that profit from activities that one considers morally or ethically questionable in general, there are other investors who seek to align their investments more specifically with their values. These investors might chose portfolios that are Faith-Based or aligned with Environmental Stability, or Animal Welfare.

Whether an individual is a major or planned giving donor to a humane society, a religious institution, an environmental organization, or any other Non-Profit, and they are an ESG or SRI investor, one of the questions they most likely will ask is – “How will these assets be invested and do these investments align with the organization’s mission and values?” If not, that donor may choose to make their gift to another Non-Profit who has had the forethought to invest in SRI or ESG strategies.

This seminar will explore Responsible Investing in depth, and its growing importance to individuals and Non-Profits in achieving their philanthropic goals.