



Money, Values and Impact:
A Conference on Ethical Investing for
Unitarian Universalist Congregations

SRI Resources

Tim Brennan, Treasurer & CFO, UUA



Investment screening

- “Demystifying Responsible Investment Performance: A review of key academic and broker research on ESG factors” A joint report by The Asset Management Working Group of the United Nations Environment Programme Finance Initiative
- “The wages of social responsibility,” Meir Statman, Glenn Klimek Professor of Finance, Santa Clara University. Moskowitz prize winning paper.
- Social Investment Forum Mutual Fund Performance Charts/
- Green America Mutual Fund Performance Chart



Shareholder advocacy

- Green America Proxy Education Center
- UUA Proxy Voting Guidelines
- Interfaith Center on Corporate Responsibility
- Ceres
- Investor Network on Climate Risk
- UUA Shareholder Advocacy



Community investing

- Community Investing Toolkit for the Faith Community
- The faith-based toolkit is an introductory guide to community investing featuring quick and efficient ways for faith-based investors to get involved in community investing.
- UUA Community Investing Match Program
- Community Investing Database



General Information

- Social Investment Forum
- Green America: Social Investing
- Principles for Responsible Investment
- Endowment model: “Pioneering Portfolio Management: An Unconventional Approach to Institutional Investment” by David F. Swensen



UUA Resources

- UU Common Endowment Fund
- UUA Socially Responsible Investing Page