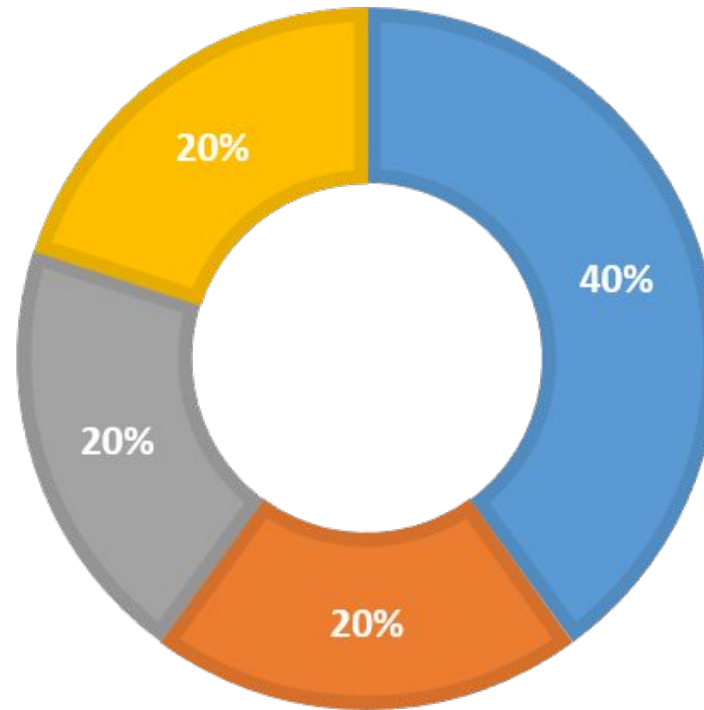


Good
Investing

Climate Legacy

Traditional Portfolio



- Canadian Bonds
- Canadian Stocks
- US Stocks
- International Stocks



Traditional Portfolio

Own Companies Like:

Exxon

Philip Morris

Lockheed Martin

TC Energy

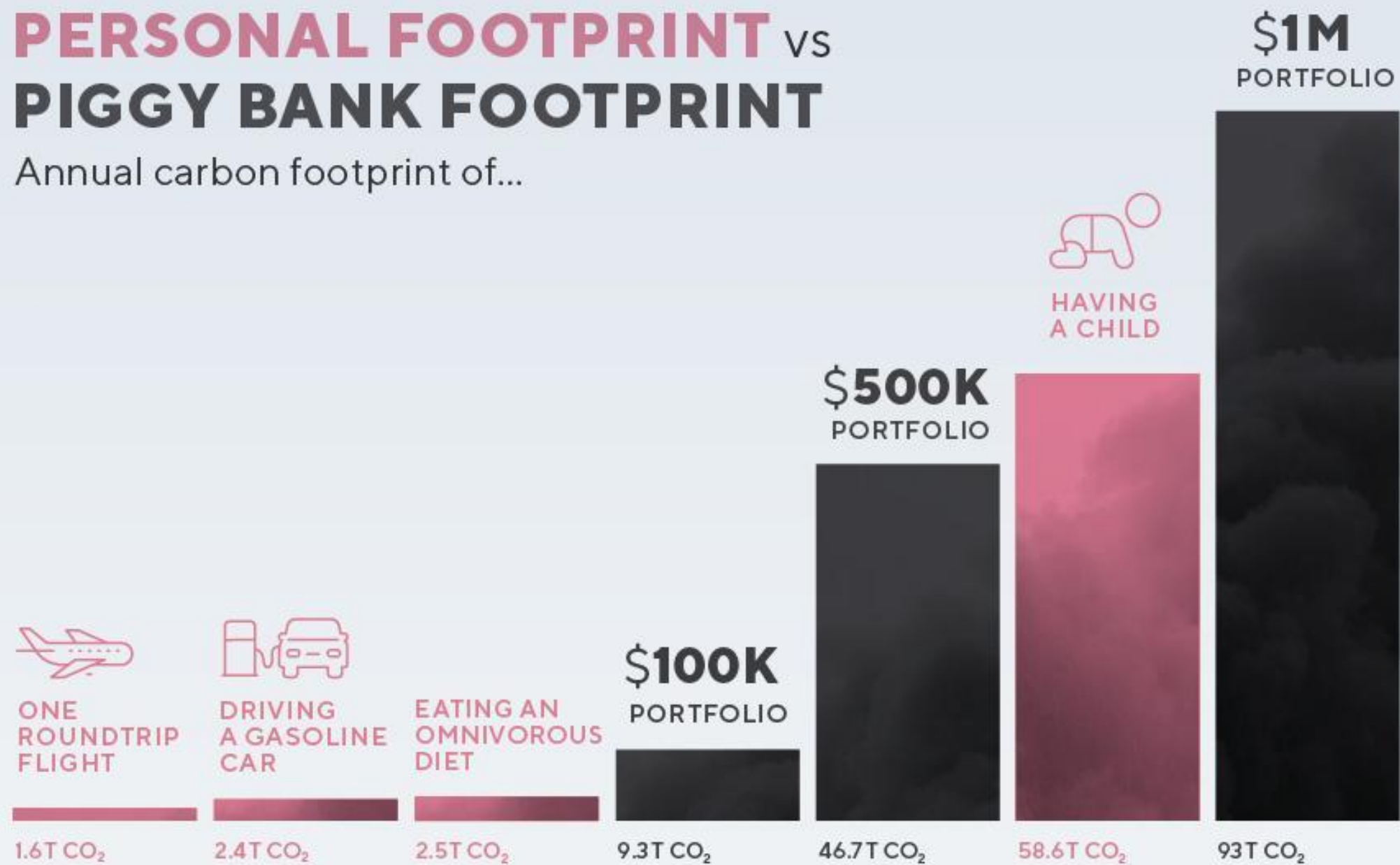
Barrick Gold

...

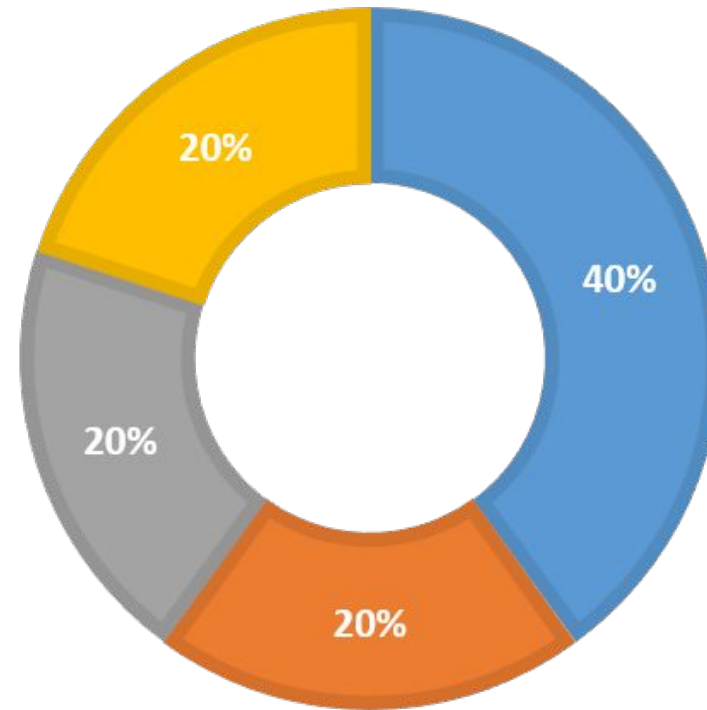


PERSONAL FOOTPRINT VS PIGGY BANK FOOTPRINT

Annual carbon footprint of...



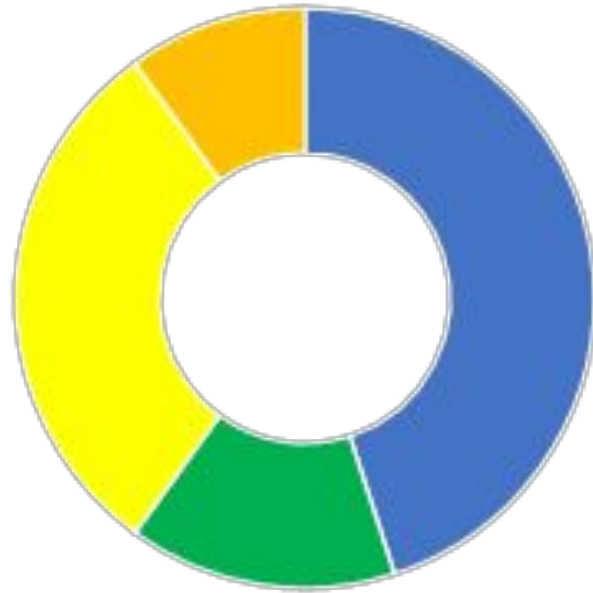
Traditional Portfolio



- Canadian Bonds
- Canadian Stocks
- US Stocks
- International Stocks



Sustainable Portfolio



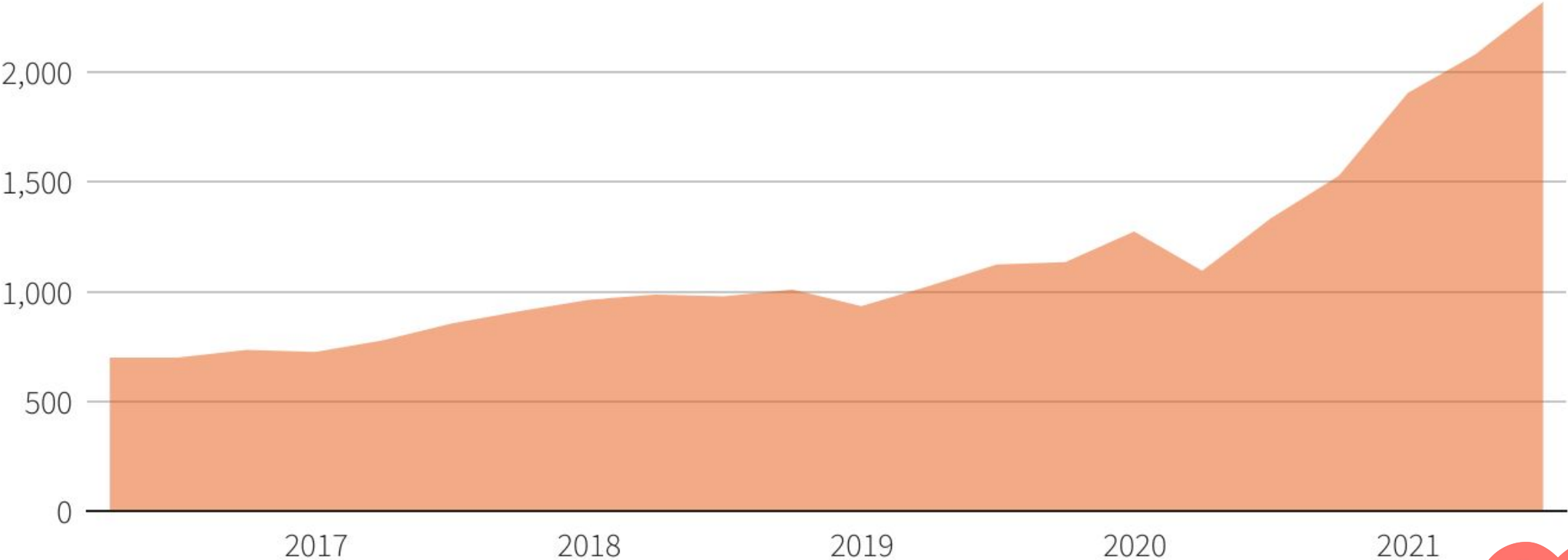
- ▣ Doing Less Evil Stocks
- ▣ Green Stocks
- ▣ Doing Less Evil Bonds
- ▣ Impact Bonds



Sustainable funds' asset size

Sustainable fund assets touched \$2.3 trillion in the second quarter

■ Sustainable



Note: Amount in \$ billions

Source: Morningstar data



Doing Less Evil

- Negative screens (exclude sin stocks)
- Environmental, social, governance (ESG)
- Shareholder activism



Greenwashing

- ESG is a popular label right now
- There are a wide range of options
- Don't trust the label, look inside



Green Stocks

- Themes like renewable energy, clean technology, and sustainability
- Usually more volatile

Impact Bonds

- Loan money directly to non-profits and co-ops in your community
- Direct positive impact



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List of available retail impact investments in Canada:

Organization	Product	Available	Min. Investment	Time Horizon	Expected Annual Return
Rhiza Capital	Coast Venture Root 3	BC	No Minimum	10 Years	5%
CED Co-op	Preferred Shares	Ontario	\$5	No fixed term	4-5%
LIFE Co-op	Preferred Shares	Ontario	\$50	No fixed term	4.5 - 5.5%
Earth Day Canada	EcoCharge	Canada	\$1,000	5 or 7 Years	3.5 - 4%
Jubilee Fund	Justice Investment Certificate	Canada	\$1,000	3 or 5 Years	0%
Ottawa Renewable Energy Co-op	Preferred Shares	Ontario	\$2,500	15 Years	3.5 - 4%
Fair Finance Fund	Sustainable Food Bond	Canada	\$5,000	5 Years	2%
Indwell	Promissary Note	Canada	\$25,000	Open - 5 years	3.5 - 4.5%
Sunshine CU	Redeemable Term Deposit	BC	\$1,000	Open - 5 years	1.40%

Final Thoughts

- More choices than ever before
- Ask the tough questions
- Put your money where your values are



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