



Values-Based Investing with OpenInvest

What is Values-Based Investing?

Values-based investing, frequently referred to as socially responsible investing, allows your investment portfolio to align with your personal values. From investing in companies with women in leadership positions to divesting from the prison industrial complex, values-based investing allows your investments to make an impact on the things you care about most.

What is OpenInvest?

OpenInvest is a values-based financial services company that works in conjunction with your financial advisor to build a customized investment portfolio created just for you. With OpenInvest, your advisor is able to create a portfolio customized for the values you care about most without sacrificing your financial future. Choose among a wide array of values and financial specifications such as your market index, tracking error, and tax optimization to create a portfolio perfect for you.

Choose Your Values

Choose among OpenInvest's wide variety of values to build your dream portfolio.

Social		Environmental
Divest from Dark Money	Support LGBTQIA+ Rights	Fight Deforestation
Invest in Disability Inclusion	Support Refugees	Defund Pipelines on Indigenous Land
Invest in Healthy Hearts	Divest from the Prison Industrial Complex	Reduce Greenhouse Gas Emissions
Invest in Ethical Supply Chains	Invest in Women Leaders	Reduce Fossil Fuel Producers
Support Animal Welfare	Divest From Weapons	Divest from All Fossil Fuels
Divest from Big Tobacco	Invest in Your Community	
Invest in Racial Justice	Support Employment of Our Veterans	
Divest from Alcohol	Divest from Gambling	

Faith and Family Values

- Catholic Values
- Halal Investing*

** Coming Soon*

Understand Your Impact

Along with your customized investment portfolio, OpenInvest provides you with quarterly impact reports that reflect the tangible impact your investments have on your personal values. From metrics like trees planted or tons of CO₂ kept out of the atmosphere to the number of companies with majority women leaders, your advisor can provide you with the real-world impact of your portfolio.

Ready to get started? Get in touch with your advisor for more information on creating your customized portfolio with OpenInvest.