

INVESTING RESPONSIBLY

Balancing people, planet, and profit

Vermont is a state that values its values. We share a collective ethos that we have to protect our local natural resources, that people matter, and that we must do a better job of mitigating our impact on the planet. Happily, this is not simply a Vermont ideal, but one that is shared by people throughout the world. This led to the establishment of what was called Socially Responsible Investing (SRI) in the recent past, which worked from a “triple bottom line” perspective of balancing people, planet, and profit. A great first step, SRI has grown and matured into what we now call ESG investing—ESG standing for Environmental Social Governance.

ESG allows investors to *put their money where their values* are by choosing organizations and sectors that align with what’s important to them. More powerfully perhaps, ESG takes the idea of individual social responsibility and shines that light on an organization’s sense of stewardship. This investing achieves two important things: growing investor wealth in a way that aligns with them while also showing the resilience and profitability of businesses that incorporate “doing the right thing” into how they work. This is what is meant by



Governance. Environmental and Social are known concepts around this kind of investing, but Governance points to the idea that how businesses choose to act matters for the long term success of the organization and the investors, as well as the planet we call home.

ESG investing may not be the right direction for every client, but it is a vital part of the offerings that we have at Park Place Financial Advisors. This isn’t a feather in our cap, but a foundation to build upon. 🐝



Going solar reinforces our commitment to sustainability and a healthy environment.