

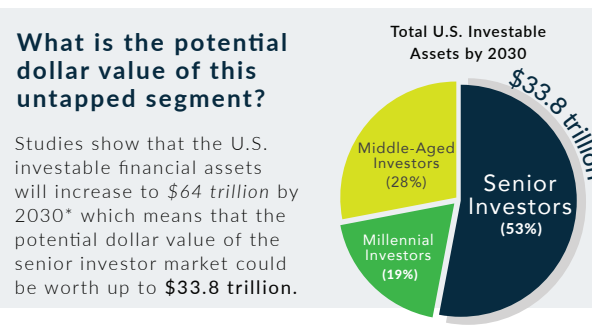
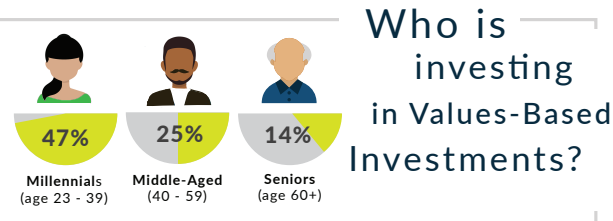
# Investors, Advisors and Values-Based Investing

Crossmark Global Investments conducted a nation-wide survey of high net worth investors to get to the core of this question - how much do investors know about values-based investing approaches?

## 1 THE UNTAPPED MARKET

There is a strong correlation between age and familiarity with terms such as values-based, responsible, and ESG investing. This large gap could potentially leave an untapped segment of the values-based market.

### How familiar are investors with the following types of investing?



\*The future of wealth in the United States. Deloitte Center for Financial Services, 2015

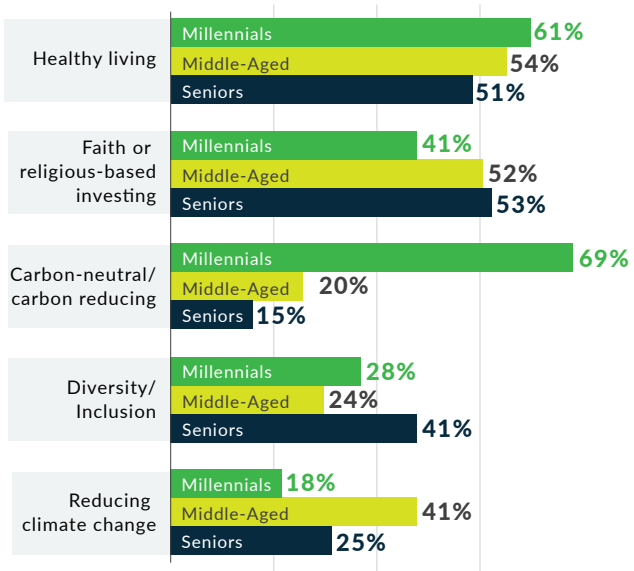
## 2 WHAT DO INVESTORS VALUE?

### THE HIGHEST RANKED VALUES ACROSS ALL RESPONDENTS

- 1 Healthy living
- 2 Faith or Religion
- 3 Carbon-reducing

### Top 5 Most Valued Principles

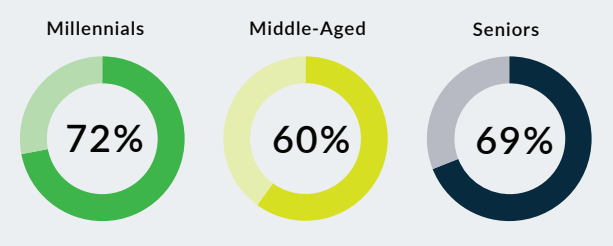
Investors ranked their top principles in order of importance.



## 3 START THE CONVERSATION

Although investors are taking on an active role in assessing the content of their portfolio, they are still relying heavily on financial advisors to help make those decisions.

### Investors Currently Using a Financial Planner or Advisor



### How do Investors Prefer to be Educated on Values-Based Investing?

