

Addressing Climate Change and Social Justice Through Sustainable Investing

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Temple Beth El
Reform Judaism, Santa Cruz Style
Jewish Community Center Aptos, California

- Presented by:
- Dayenu Circle of Temple Beth El
- (National Dayenu -- <https://dayenu.org/climateinvest/>)
- Chadeish Yameinu
- Santa Cruz Zen Center
- TBE Lifelong Learning Committee

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MYTHS

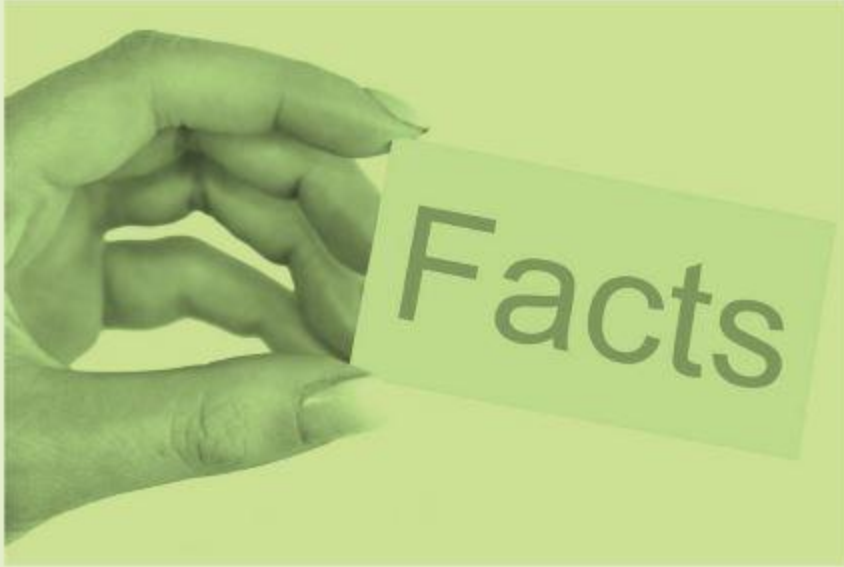
My small investments won't make a difference...

I can't earn as much if I move my money...

I have to include the energy sector in my portfolio to earn enough...

It's too risky....





FACTS

Investments are a part of everyone's carbon footprint

Sustainable funds can match or outperform many conventional funds

Sustainable investing encourages more socially just corporate practices (tzedek)

Sustainable investing is growing fast (53% growth from 2020-2021)

Avoiding fossil fuels makes your portfolio less volatile (less risky)

Where do You start? - Start where you are!



Begin With Your Values

What do you care about?

What impact do you want to have?

What are your hopes for your sustainable investing?



Which first steps are best for you?



Share and Discuss in your Breakout Rooms

Values / Motivations

First Steps

Obstacles & Solutions

Goals & Actions



Come back with insights and inspirations to share.....

Insights and Inspirations – What Moved You?



Which values motivate you the most?

Which first steps will you take?

What holds you back / will keep you going?

Examples of SMART goals?

RESOURCE SLIDES FOLLOW



“Taking Stock” Tools and Information:

Tools to Evaluate various funds across issue areas

<https://www.fossilfreefunds.org>

<https://www.i>

<https://www.asyousow.org/invest-your-values>

Online Basic Sustainable Investing Class

<http://www.ussif.org/sribasics>

Funds List from The Forum for Sustainable and Responsible Investment

<http://charts.ussif.org/mfpc/>

Information and Reports on Sustainable Investing

<http://www.ussif.org/performance>

Directory of Planners/Advisors and Firms

http://www.ussif.org/AF_MemberDirectory.asp

Mutual Fund Resources:

- [Deforestation Free Funds](#), which may be of interest if you are concerned about rainforest destruction and the palm oil exposure of funds.
- [Gun Free Funds](#), which shows how your money might be invested in gun manufacturers and gun retailers.
- [Gender Equality Funds](#), which screens funds using company performance on 12 key gender equality indicators.
- [Weapon Free Funds](#), which shows how your money might be invested in weapons of war.
- [Tobacco Free Funds](#), which shows if your fund has tobacco companies, and if they are promoting tobacco to kids.
- Switch funds to better options use the [online list of mutual funds and ETFs offered by members of US SIF](#).
- Review the [globe ratings from Morningstar](#), and the [Heart Ratings from Natural Investments](#) to learn about the sustainability attributes of your funds.

Additional Resources

- Dayenu – A Jewish Call To Climate Action <https://dayenu.org/>
- As You Sow <https://www.asyousow.org/>
- Invest Your Values <https://investyourvalues.org/>
- Green America: Socially Responsible Investing <https://www.greenamerica.org/socially-responsible-investing>