

Investment Advisory Services

Date: [Insert Date]

Dear [Client's Name],

We are pleased to present our investment advisory services focused on socially responsible investing (SRI). Our objective is to align your investment goals with ethical values while achieving a competitive return.

Your Investment Objectives

Understanding your investment preferences is essential. We believe in a personalized approach and will work closely with you to identify your specific SRI objectives, including:

- Environmental sustainability
- Social justice
- Corporate governance

Investment Strategy

Our investment strategy will incorporate the following elements:

- Screening potential investments for ethical implications
- Engaging in shareholder advocacy
- Monitoring and adjusting your portfolio to ensure alignment with your values

Performance Measurement

We will provide you with regular updates on your portfolio's performance, benchmark comparisons, and impact assessments to ensure transparency and ongoing alignment with your goals.

Next Steps

We invite you to schedule a meeting with us to discuss your investment aspirations in greater detail. Please contact us at [insert contact information] to set up a convenient time.

Thank you for considering our investment advisory services. We look forward to the opportunity to work with you towards achieving your socially responsible investing goals.

Sincerely,

[Your Name]

[Your Position]

[Your Company]

[Your Contact Information]