



**Financial
Wellness
Done
Right™**

Financial Wellness

**Socially
Responsible
Investing**

Aligning your financial goals with your values

Securities offered through LPL Financial, Member FINRA/SIPC. Investment advice offered through Great Valley Advisor Group, a Registered Investment Advisor.

Next Level Planning & Wealth Management and Great Valley Advisor Group are separate entities from LPL Financial.

Agenda

What is & Why ESG Investing

Debunking Myths

Investor Takeaways



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Responsible Investment

Responsible Investment is an approach to investing that incorporates Environmental, Social, and Governance (ESG) factors into investment decisions.

ESG aims to generate sustainable, long term returns.

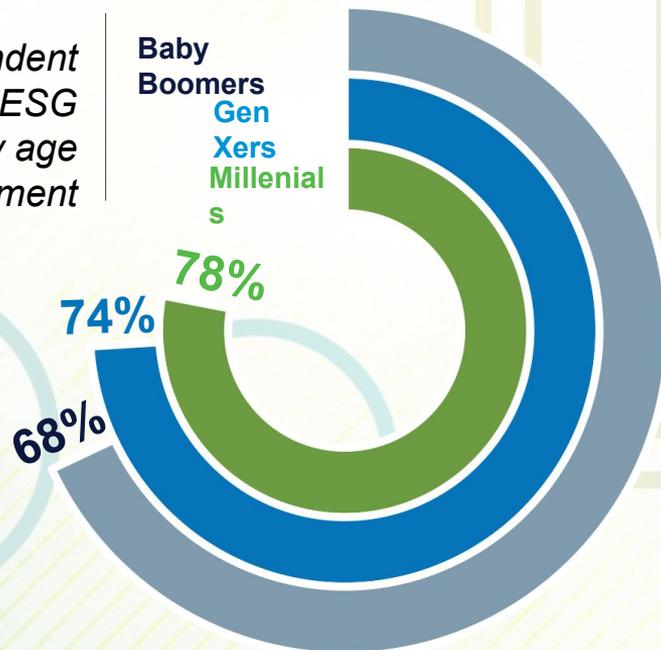
Ultimately incorporates 'value and 'value-based investing.



Responsible Investing has a cross-generational appeal

While millennials are most likely to take ESG issues into account in their investment decisions, Gen-Xers and baby boomers aren't far behind.

Percentage of respondent taking at least one ESG issue into account, by age segment

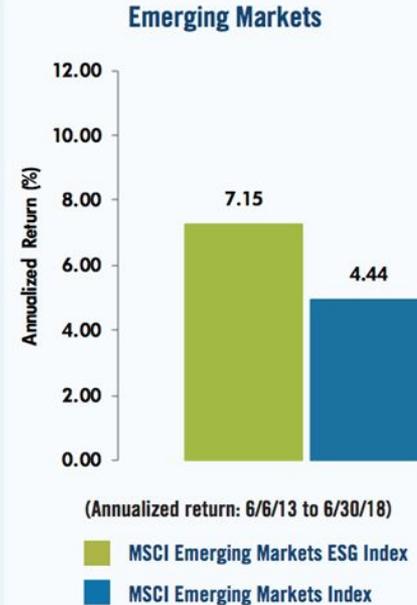
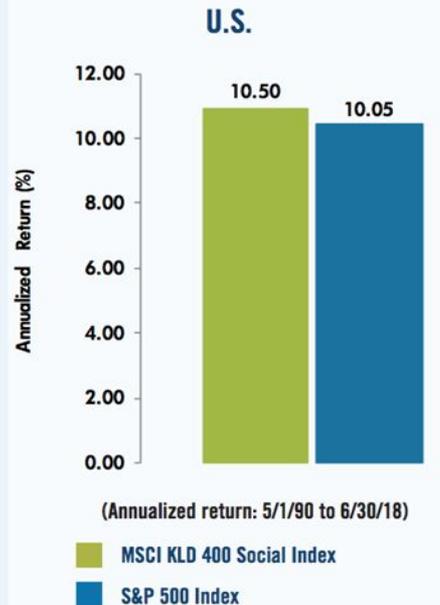


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Debunking Myths #1:

“Sustainable Strategies *Underperform* Conventional Ones”

By integrating ESG criteria into financial analysis, we seek to mitigate risk and produce competitive returns.



Data as of 6/30/2018.



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Five takeaways for investors



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1

Corporate preparedness and resiliency in managing off-balance sheet risks are a key consideration in investment outcomes.

Business and investment decision-making

- **Treat workers and other stakeholders well**
- **Use resources to prepare for climate change**
- **Identify, measure and manage off-balance sheet risks**
- **Navigate company through the C-19 crisis**



What We Offer

Saving for retirement

Buying a home

Merging finances with a spouse

Creating a budget

Caring for an aging parent

Investing basics

