

Our number one priority for nearly 30 years:

HELPING YOU PURSUE FINANCIAL SUCCESS  
AND INVEST BASED ON YOUR VALUES.



# IMPACT SPOTLIGHT

## About Us

Since 1987, Progressive Asset Management has helped investors across the country align their portfolios with their values.

## Our Team

Led by our founder, Eric Packer, our team has decades of experience providing expert financial advisory services to clients like you. Working with us means speaking directly with the professionals in our offices in Wellesley Hills, Massachusetts and St. Johnsbury, Vermont.

Attentive, personalized socially responsible investing is our entire business; your ethical and financial priorities are ours as well.

## Contact Us

Massachusetts: 781-239-1187

Vermont: 802-748-0500

Toll Free: 800-327-7003

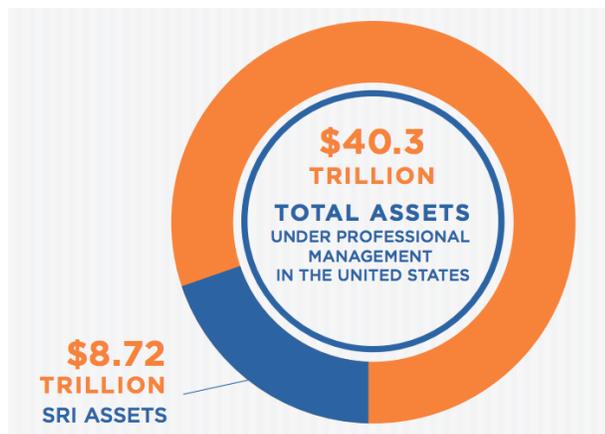
Fax: 781-239-0288

## *Your Investments Can Make an Impact*

Socially responsible investing is booming. Nearly one-fifth of all US assets under management are now subject to screening for ethical and environmental factors - a movement that has grown by trillions in a few short years.

We hope this Progressive Asset Management Impact Spotlight gives you some insight into the meaningful environmental and social changes your investments can help affect. Socially Responsible Investing continues to grow exponentially, with dollars invested increasing 1.7 times since 2014, as more people realize the powerful changes this investment strategy continues to make.

## Size of Sustainable, Responsible and Impact (SRI) Investing in 2016



[US Social Investment Forum, 2016 Report on Sustainable and Responsible Investing Trends]



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Asset Management

## Community Development

The Brown Advisory Sustainable Growth Fund has partnered with Johns Hopkins and 24 other Baltimore-area businesses pledging to harness their collective influence to help strengthen the city by expanding existing programs or launch new ones to build, hire, invest, and buy locally. These commitments will infuse at least \$69 million into local and minority-owned, women-owned, and disadvantaged businesses over the next three years.

## Sustainable Housing

Community Capital Management helped to create Spencer Green Apartments, housing in a low-income census tract that employs green and environmental sustainable building practices. The 48 new affordable apartments on the site of the former Chelsea Armory features electricity generation photovoltaic panels, an underground rain-recycling cistern for irrigation, and extensive use of recycled and sustainable construction materials, including hardwood flooring that has been re-purposed 3 times, originally reclaimed from Boston University.

## MA Right to Know GMOs

Green Century is doing its part to help mandate GMO labeling in the U.S. They support Massachusetts' GMO labeling bill and have succeeded in pressuring Kraft Foods to not oppose labeling on the ballot question in Washington state.



A pioneer in socially responsible investing, PAM gives clients the opportunity to invest based on their values and beliefs.

## Corporate Accountability

January 30, 2017

PAM is a proud signatory of a letter from the International Corporate Accountability Roundtable; Institute for Human Rights and Business; and the Interfaith Center on Corporate Responsibility to Members of President Trump's Strategic and Policy Forum.

The letter speaks out strongly against the President's Executive Order restricting entry into the U.S. for refugees, immigrants, and documented residents from selected countries. It also urges the U.S. government to work with other nations to align corporate policies and practices with the United Nations Sustainable Development Goals. Further, the letter recommends that President and his Administration join with the global business community in scaling up efforts to ensure respect for the human rights of workers, regardless of their ethnicity, race, religion, nationality, immigration status, sexual orientation, or gender identity, at home and in global value chains.

Here at Progressive Asset Management, we believe that promoting respect for human rights and responsible business conduct will not only benefit the American people, but will ensure an inclusive and prosperous economy.



## *Divest Trump: A Trump-Free Portfolio*

The Trump Administration so far has confirmed their plans for keeping his regressive and harmful policies, including: Green lighting the Dakota Access and Keystone XL Pipelines, building a wall on the southern border paid for by American taxpayers, an unprecedented ban on immigration from seven nations, and a cabinet who are largely skeptical of man-made climate change.

As more climate change skeptics join Donald Trump's cabinet and executive orders further deregulating the fossil fuel industry roll out, fossil fuel free investing is representative of an action against this administration's regressive anti-environmental agenda. This form of strategic investing will make your portfolio reflective of your disdain and disapproval of this current administration, and its fossil fuel friends who benefit from its socially harmful policies.

With this in mind, we are providing a new investment screening for a Trump-Free Portfolio. Progressive Asset Management Boston has compiled a list of publicly traded companies who have supported Donald Trump in his campaign efforts, whether financially or vocally. Our voices are needed more than ever, and we continue to urge our friends to divest from fossil fuels.

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### *Nonprofits Progressive Asset Management has supported since Inauguration Day*

Union of Concerned Scientists  
Conservation Law Foundation  
Audubon  
The Nature Conservancy

The Trustees of Reservations  
Green Restaurant Association  
Farm Aid  
Environmental League of Massachusetts

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### *Adventures in Activism & Advocacy*

Personally, the PAM Team has supported numerous causes in 2017 including:

- ◆ Women's March
- ◆ March for Science Washington
- ◆ March for Science Boston
- ◆ People's Climate Movement Washington D.C.
- ◆ Boston People's Climate Mobilization
- ◆ Interfaith Power & Light Divestment Campaign



## **Sustainable Agriculture**

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Through direct corporate engagement, Green Century investors have been making an impact on antibiotics. Experts believe that the overuse of antibiotics will cause the rise of antibiotic resistant bacteria that threatens human health.

Recently, Starbucks, Subway, McDonald's, Kroger, Kentucky Fried Chicken, and Darden have all agreed to decrease or stop the routine use of antibiotics on animals. Green century also has an eye on the treatment of these farmed animals, pushing Panera to only use eggs from farms without confinement cages and asking Tyson to stop keeping pigs confined to gestation grates.

## **Fighting the KXL Pipeline**

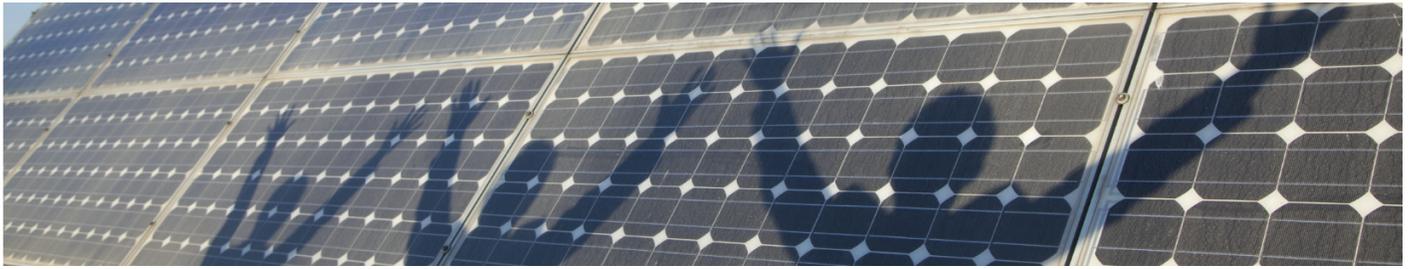
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Calvert Investments is in support of the Sioux people at Standing Rock, North Dakota. Calvert shows their support for the Sioux by fighting for the rights of indigenous people with their investments. Calvert never invests in fossil fuel extraction, and always encourages corporations to engage with indigenous people.

## **Forest Protection Campaign**

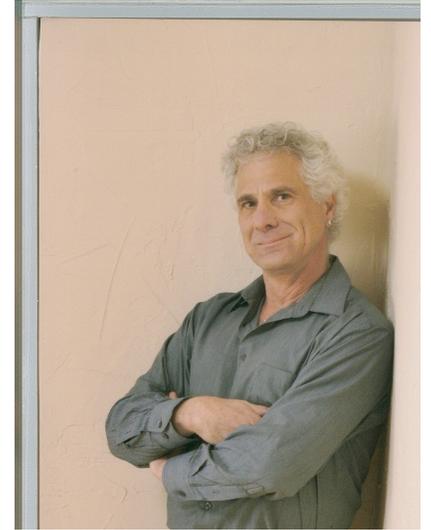
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Green Century has launched a 5-year Forest Protection Campaign to fight deforestation caused by soy, cattle, timber, rubber, and palm oil. They also plan on engaging global investors through their seat on the United Nations Principles for Responsible Investment Advisory Board.



Since 1987, Progressive Asset Management has helped investors across the country align their portfolios with their values. A professionally managed SRI portfolio can help you realize your financial goals, as well as increasing corporate accountability to employees, consumers, and the environment. Progressive Asset Management is a proud supporter of 350.org, the US Social Investment Forum, the Interfaith Center on Corporate Responsibility, the US Climate Action Network, and other organizations promoting a more sustainable and just global economy.

With nearly three decades of experience in innovative, socially responsible investing, clients have the added benefit of our advisors' unique expertise and insight into how ethical business practices and sustainability can affect the bottom line.



**Contact Us**

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**Strategic Relationships**



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