

ADVISOR 1N SIGHT

GOING GREEN WHILE MAKING GREEN: CLEAN WATER

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Contact Us

What you do today charts the course
for your financial security tomorrow.

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Nearly every report on the subject confirms we are facing a global water crisis. While we are all responsible in making sure we don't abuse water as a resource in our personal lives, residential water use only accounts for 11% of global consumption. Corporations are the main consumer of this dwindling resource. We, as consumers and investors, have the power to regulate and reward companies, both large and small, for their responsible utility and innovation of water.

As investors, we can actively divest from and/or impact the policies and decisions that companies make. Here are some Exchange Traded Funds (ETFs) and Mutual Funds (MFs) that focus on clean water companies:

- Calvert Global Water Fund Class A (CFWAX)
- Ecofin Global Water ESG Fund (EBLU)
- Global X Clean Water ETF (AQWA)
- Invesco Global Water Index ETF (CGW)
- Invesco Water Resources ETF (PHO)

There are many privately traded companies that are leaders in the water innovation space. Some current examples (at the time of this revision) include: **Xylem; Energy Recovery; Power Tech; Evoqua; Zurn; DeSaH; WHI; and Innovyze.** The ETFs and MFs listed above allow you to invest in these privately owned companies at lower investment levels. They will also diversify your risk in this space since these innovations are higher-risk investments.

Please note: there may be opportunities to invest directly in these innovative companies. If you are interested, we will assist in the due diligence process to determine if this investment is right for you and the amount you wish to invest.

Please also note: the securities mentioned above may not be a recommended

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Jim Brennan is a Certified Financial Planner® and CEO for 1 North Wealth Services, LLC, located in Annapolis, MD. This boutique fee-only wealth management firm specializes in helping clients optimize their investments for their specific goals, risk parameters, and time horizons—be it retirement, charitable planning, or family wealth transfer. Jim has been a socially responsible impact investor for nearly 30 years and specializes in guiding clients on matching their values with their investments. If you are interested in learning more about socially responsible investing (SRI/ESG), please contact Jim's office to schedule a free initial consultation at 410-975-0099 or info@1nwealth.com.

buy today but are meant to be considered as examples of securities that support clean water. Please consult your investment advisor to determine if these securities are suitable for you based on your goals and risk parameters.

You can use your investments to go beyond clean water to help change the world or your local environment by matching your interests and objectives with impact groups such as these:

- **US SIF**—The Forum for Sustainable and Responsible Investments is the US membership association for professionals, firms, institutions, and organizations engaged in sustainable and responsible investing. US SIF and its members advance investment practices that consider environmental, social, and corporate governance criteria to generate long-term competitive financial returns and positive societal impact. <http://www.ussif.org>
- **ImpactAssets**—ImpactAssets is a nonprofit financial services firm that increases the flow of capital into investments that deliver financial, social, and environmental returns. Its impact

investment strategies, donor advised fund and knowledge resources provide a dynamic platform for socially-conscious investors to advance social or environmental change through investment. <http://impactassets.org>

- **Green America**—Green America's mission is to harness economic power—the strength of consumers, investors, businesses, and the marketplace—to create a socially just and environmentally sustainable society. It works to create a world where all people have enough, communities are healthy and safe, and Earth's bounty is preserved for future generations. <http://www.greenamerica.org>
- **JUST Capital**—JUST Capital is the only independent nonprofit that tracks, analyzes, and engages with large corporations and their investors on how they perform on the public's priorities. Its research, rankings, indexes, and data-driven tools empower all market participants to help build a more just economy. It is neutral and data-driven – an honest broker working to move the vision of stakeholder capitalism from rhetoric to reality. www.justcapital.com ▲

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