

# **Socially Responsible Investing**

## **"Making a Difference with Ideals, Impact, and Involvement"**

### **FREE 2006 Teleconference Workshops**

**For Whom:** Social Justice Committees, Finance & Endowment Committees, Treasurers, investing clubs and individual UUs interested in using money as a tool for social justice. Gather around the speaker phone with juice and muffins for one or all three of these new learning sessions.

**What:** The UUA Committee on Socially Responsible Investing is proud to present three free learning sessions to be enjoyed in the comfort of your own congregation, community, or home – no travel required. The theme is "Making a Difference with Ideals, Impact and Involvement." Each session will teach one of the key strategies of the socially responsible investing movement. You'll learn concrete steps to get strategies implemented in your personal life or within your congregation.

**Why:** Ownership confers authority and responsibility. Just by living our everyday lives we own the values of the economic system: we purchase, invest, even lend money every day. Join us for one or more of these sessions to learn how our assets can make our UU values a powerful reality in the world.

**How:** All you need is a phone or a speakerphone if you're hosting a group listening session (highly recommended). Download each PowerPoint presentation from the website at [www.uua.org/finance/sri](http://www.uua.org/finance/sri) or request a copy to be emailed to you beforehand. Each session will include a 45 minute presentation by members of the Committee on SRI, followed by 15 minutes of questions and answers. Please register at least 3 days before each call with Audra Friend at [afriend@uua.org](mailto:afriend@uua.org). Include your name, e-mail address, congregation and your role.

**Call-in # for each session is (866) 868-1054, code 1571617.**

**When:** Each session is on a Saturday morning for one hour from 1 pm EST to 2 pm EST. Start times in other regions: 10 am in the Pacific Time Zone, 11 am in the Mountain region, and 12 pm Central.

#### **Impact – Community Investing** **Saturday, February 4<sup>th</sup>, 1pm EST**

You've heard about the fringe banking community – payday lenders, check-cashing centers, etc. There's another sector of financial institutions serving low-income communities by creating wealth rather than stripping it -- community development financial institutions (CDFIs). CDFIs include banks, credit unions, and loan funds. Your congregation can invest in these and thereby support fairly priced capital access that creates jobs, finances affordable housing, and fosters microenterprise development. Join this call to learn what you can do and how the UUA can match your investment.

#### **Ideals – Investment Screening** **Saturday, February 18th, 1pm EST**

What we choose to buy and where we choose to invest loudly proclaims our ideals. This seminar will help us set standards and wend our way through the grey areas. A special focus will be HOW TO discern the choices in mutual funds investing.

#### **Involvement -- Shareholder Activism** **Saturday, March 4th, 1pm EST**

Shareholder activism has caused major corporations to change their behavior. For instance, as a result of a carefully orchestrated dialogue with management and finally the CEO of Home Depot, that company changed its policy to include sexual orientation as one of the prohibited discriminations. See [uua.org/finance/sri/justice/homedepot/casestudy.html](http://uua.org/finance/sri/justice/homedepot/casestudy.html), or go to [uua.org](http://uua.org) and type in "shareholder activism." Join this call to learn how you can take part in this vital movement and demonstrate that our faith can make mountains move.