

It's time to rethink Socially Responsible Investing.



Have you considered Socially Responsible Investing (SRI) before, but discarded it because you didn't want to sacrifice performance? *Reconsider.* With the growth in the industry, more investment options are available than ever before. This is no longer a peripheral opportunity only acceptable to a small group. In recent years, SRI has flourished into a compelling investment option. You can now build a diverse, sophisticated portfolio incorporating SRI that helps deliver competitive performance.

SOCIALLY RESPONSIBLE INVESTING CAN HELP YIELD COMPETITIVE RETURNS

Academic studies demonstrate that socially responsible investment strategies perform competitively with non-SRI strategies over time. A recent study conducted by the United Nations Finance Initiative indicated no negative relationship between socially responsible investing and portfolio performance.² Further studies conducted by independent and governmental organizations support these findings.

These studies suggest what FEG has always believed, portfolio performance can be generated from sound asset allocation and manager selection.

You do not have to sacrifice investment quality to build a Socially Responsible Investment portfolio.

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Fund Evaluation Group[®]
investment advisors

FEG AT-A-GLANCE

SERVICES:¹

Managed Solutions

- Outsourced CIO
- Hedge Funds
- Private Capital Funds

Consulting

- Portfolio Construction
- Performance Monitoring

Research

- Manager Search and Due Diligence
- Asset Allocation

CLIENTS:

Institutions: University Endowments, Public and Private Foundations, Corporate Retirement Plans, Banks, Insurance Companies, Nonprofit Organizations

Financial Advisors: Independent RIAs, Broker Dealers, Wealth Managers, Financial Planners, Family Offices

ASSETS UNDER ADVISEMENT:

Approximately \$50 billion²

RESEARCH TEAM:

- Macroeconomic Analysis and Capital Market Assumptions
- Comprehensive Money Manager Research
 - Conducts Hundreds of Manager Meetings Annually

ESTABLISHED 1988

LOCATIONS:

Cincinnati, OH (HQ) with offices in Detroit, MI and Indianapolis, IN

www.feg.com

¹ Not all products may be available to all investors. ² As of December 31, 2015. Assets under Advisement (AUA) include the assets of FEG and its affiliated entities. Some asset values may not be readily available at the most recent quarter end; therefore, the previous quarter's values were used for this calculation. The values may be higher or lower, depending on the current market conditions. These accounts are typically non-discretionary only. AUA includes both discretionary assets, over which FEG has full trading authority, and non-discretionary assets which we advise and make recommendations on, but may not have authority to execute or facilitate trades on behalf of the client. AUA includes approximately \$46 billion in non-discretionary assets. Assets under Management (AUM) includes approximately \$2.7 billion under discretion and approximately \$854 million under discretion in FEG affiliates.

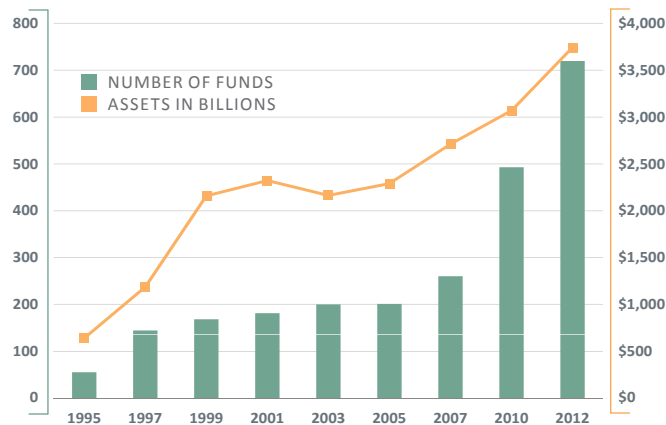
Today, both large institutions and individual investors alike can make investment decisions that are in line with their social and financial goals.

MORE SRI STRATEGIES AVAILABLE NOW THAN EVER BEFORE

Socially responsible assets represent over \$3 trillion — a 380% increase since 1995. Nearly one of every eight dollars under professional management is invested in a socially responsible manner.³

Because of this demand, there are multiple SRI investment strategies available today that did not exist 10 years ago. Virtually all styles or asset class strategies needed to build a diverse portfolio exist in a socially responsible fund, including domestic, international, and emerging stocks (small-, mid-, and large-cap), global bonds, real assets (clean energy such as wind, natural gas, conservation-related forestry investments, and conservation-related rural real estate), and various clean-tech and sustainability investments.

GROWTH OF SRI FUNDS AND DOLLARS INVESTED



DATA SOURCE: Social Investment Forum Foundation. "2012 Report on Sustainable and Responsible Investing Trends in the United States." ESG funds include mutual funds, annuity funds, closed-end funds, exchange-traded funds (ETFs), alternative investment funds and other pooled products, but exclude separate account vehicles and community investing institutions.

MAKE A DIFFERENCE THROUGH SOCIALLY RESPONSIBLE INVESTING

As a leader in nonprofit, institutional investment advisory services, Fund Evaluation Group, LLC (FEG) incorporates the same rigorous due diligence process used in traditional investment manager research to help uncover the best Socially Responsible Investment managers for consideration in investment portfolios.

Recognizing that investors want choices in how they meet their financial goals and impact corporate responsibility and sustainability practices, we can apply SRI solutions across our range of consulting and advisory services.

To discuss incorporating socially responsible investment strategies into your portfolio, please contact:

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² The United Nations Environment Programme Finance Initiative. "Demystifying Responsible Investment Performance" October 2007

³ US SIF Trends Report. 2010



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Fund Evaluation Group, LLC, Form ADV Part 2A & 2B can be obtained by written request directed to: Fund Evaluation Group, LLC, 201 East Fifth Street, Suite 1600, Cincinnati, OH 45202 Attention: Compliance Department.