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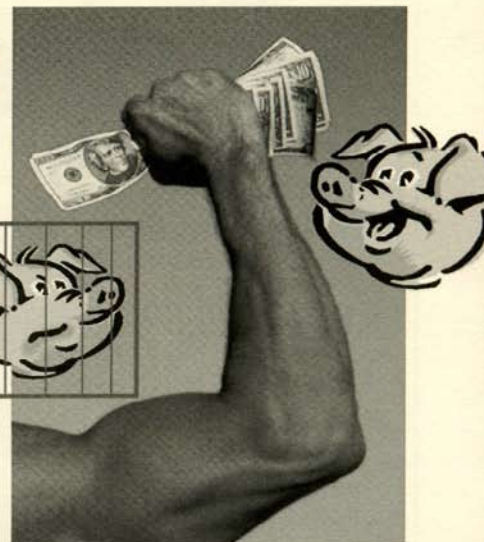
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Careful about your food, what about your investments?

by Ron Robins

As vegetarians and vegans, we are concerned about what foods we buy, the way our food is prepared and how we might eat a meal. One thing we share is that we do not believe in killing animals. We are also concerned about our environment. In addition, we may have personal health issues. And for many of us we might be vegetarian or vegan for spiritual or religious reasons. The common thread for all of us is that we have important personal values related to being vegetarian or vegan. Now if we are true to these values, should we not also incorporate them into our investing affairs?

But how can anyone really decipher their values and apply them to investing? Well for a start, try this. Sit down, take a pen and write down what you



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Ethical investing

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really believe in. From these beliefs extract your values. Then, examine your investment holdings. If you have mutual funds and web access, go to the website of the mutual fund company and locate the list of investments that your fund holds. While at the computer, look up on the web some of the companies in the mutual fund, or in your individual stock portfolio, to see what they do. See how true your investments are to your values. You are likely to be in a state of shock at what you discover!

The next step is to do something to change your investments to more closely resemble your values. A serious question here is: can you do that and still make decent profits? The answer is yes. The best data on this comes from the United States. Using the well-known Morningstar mutual fund ranking data, the Social Investment Forum (U.S.) showed that funds applying social and environmental screening criteria consistently outperformed mutual funds generally in the years 2001 to 2003.

Similarly in Canada, the screened Jantzi Social Index has usually outperformed its unscreened Toronto Stock Exchange index equivalents since its formation in January 2000.

GTA residents can find an easy way to define and apply their values to investing is through my workshop, *Envisioning the Future for Profit & Fulfillment*, being offered on September 18 and November 27. By the end of this six-hour workshop, participants will have created a 'big vision' investment picture incorporating their values. Typical of the comments on this workshop are those of Frank Miotto, a successful Toronto financial advisor, who says, "This is the only workshop I know that shows investors how to easily integrate their inner values with investing."

For information on my workshop go to www.investingforthesoul.com or call me at 416-932-9380. ■

Ron is founder of Investing for the Soul. His mission is to help investors bring their values to investing. Ron has a deep background in the investment industry, and over 35 years in spiritual development. He is also a TVA member.