PUTTING YOUR MONEY WHERE YOUR VALUES ARE PAYS FOR INVESTORS

Local investment firm, Cascade Financial Strategies, launches new blog: SRI Bend (www.sribend.com), to address objections and misconceptions about Socially Responsible Investing.

Socially Responsible Investing (SRI) has undergone significant changes in the last few years and is experiencing impressive growth in many areas. A significant number of investors, both individual and institutional, are seeking to align the direction of their investments with their core values. $1 of every $6 being professionally managed in the U.S. - almost $6.7 trillion - is in some form of sustainable investment according to a recent report by Morgan Stanley. The blog is co-authored by Jack Schniepp and Ryan Andrews, partners at Cascade Financial Strategies (www.cascadefs.com).

"Our goal with this new blog is to not only introduce tools and information to help with this process, but also to clarify common misconceptions and counter objections which permeate the SRI arena." explains Jack.

When investors ask their financial advisors about SRI portfolios the advisor will typically answer that SRI is available, but investment returns will likely be sacrificed. "I know, because that is what I used to tell clients in my first ten years when I worked at the larger investment firms" says Jack. "That message, which we were given as advisors, is unsubstantiated."

Morgan Stanley's Institute for Sustainable Investing released a report earlier this year that examined 13,102 mutual funds & separately managed accounts and found, **"investing in sustainability has usually met, and often exceeded, the performance of comparable traditional investments. This is on both an absolute and risk-adjusted basis, across asset classes and over time."** The below table and chart demonstrates the improved returns over periods. "The data is in," comments Ryan Andrews, "investors should revisit their perceptions around SRI investing."

The SRI Bend blog regularly addresses this misconception about returns. A recent post highlights a move by S&P Dow Jones Indices (S&P DJI), one of the world's leading providers of financial market indices, to create an SRI index comparable to the S&P 500. Not only is this significant because it confirms the increased demand in SRI, but the index returns highlighted below for the 3+ years that it has been tracked, outperformed the S&P 500!

With the misconception over returns out of the picture, investors are free to pursue aligning their values with their portfolios. SRI Bend provides resources for this important transition.

CONTACT:
jack@cascadefs.com
541-678-5475
243 Scalehouse Loop, Ste 3B Bend, OR 97702

Comparison of returns for S&P 500 Index & S&P SRI Index as of May 31, 2015 (percent)

	1-month	Year-to-date	1-year	3-year
S&P 500 Index	1.29	3.21	11.81	19.67
S&P SRI Index	1.62	3.42	14.43	20.12

About Socially Responsible Investing
Socially Responsible Investing (SRI) is an investment philosophy that includes the evaluation of investments based on their environmental, social, and corporate governance in addition to traditional financial and business criteria.

About Cascade Financial Strategies
Cascade Financial Strategies (CFS) is a boutique investment management and financial planning firm based in Bend, Oregon. CFS is the only firm in Central Oregon that is a member of the US/SIF, The Forum for Sustainable and Responsible Investment. CFS is an advocate and supporter of many other local and national organizations that promote sustainable and responsible living. Cascade Financial Strategies is a Registered Investment Advisor (RIA).

Jack Schniepp
Jack has been advising clients on their financial needs since 2002. Prior to this he spent twelve years as a collegiate baseball coach. Jack has a Bachelor Degree from Westmont College in Santa Barbara, CA, Masters Degree from E. Stroudsburg Uni. in PA, and is a CERTIFIED FINANCIAL PLANNER (CFP®,) and a Chartered Financial Consultant (ChFC®).

Ryan Andrews
Ryan has ten years experience in investment management, business and entrepreneurship. Ryan has worked for the corporate office of LPL Financial and was part of the institutional account management team at PIMCO specializing in Foundations and Endowments. As an entrepreneur, Ryan has worked for two technology startups raising venture capital and private equity. He has a bachelor's degree in Business & Financial Management from Cal Poly SLO and is a Level II CFA candidate.

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