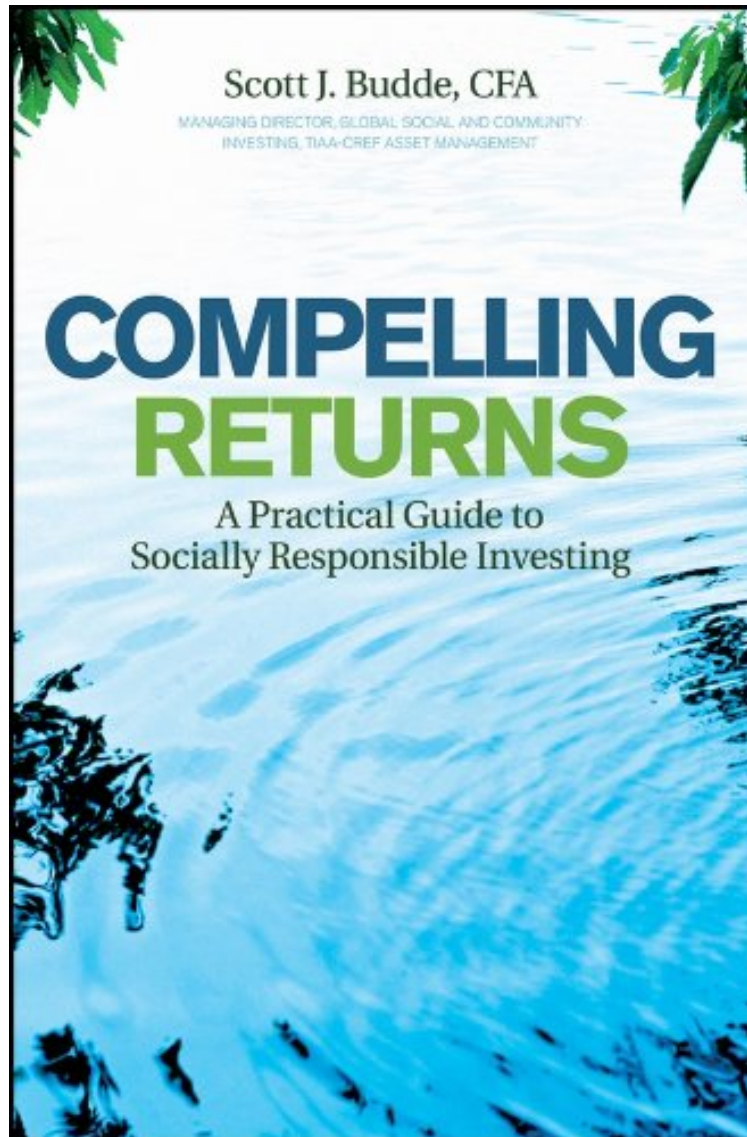


Compelling Returns: A Practical Guide to Socially Responsible Investing

Scott J. Budde

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#1890736 in eBooks 2008-09-25 2008-09-25 File Name: B001JKV8Q0 | File size: 60.Mb

Scott J. Budde : Compelling Returns: A Practical Guide to Socially Responsible Investing before purchasing it in order to gage whether or not it would be worth my time, and all praised Compelling Returns: A Practical Guide to Socially Responsible Investing:

Achieve competitive financial returns and make a difference at the same time by applying the information in *Compelling Returns: A Practical Guide to Socially Responsible Investing*, a well-rounded guide to socially responsible investing (SRI). Understand the basics of SRI and discover how you can align your values with your investments by choosing from three basic strategies. Learn to implement these strategies in your investment portfolios and combine your newfound knowledge with the basic principles of successful investing. An up-to-date directory of companies involved with SRI is included.

From the Inside Flap

Receiving widespread attention from both individual and institutional investors, Socially Responsible Investing (SRI) is no longer a niche area in the field of finance. And with concerns over environmental, social, and governance (ESG) issues on the rise, this proven approach will put you in a better position to achieve competitive returns in the years ahead. As leader of TIAA-CREF's Global Social and Community Investing initiative, author Scott Budde is responsible for finding investment opportunities and social screening strategies that create a positive social impact and competitive returns. Now, with *Compelling Returns*, he discusses what it takes to excel at this endeavor and shows you how to profitably align your values with your investments. Filled with the extensive experiences of an expert in the SRI field, *Compelling Returns* opens by addressing some basic, but important, issues associated with socially responsible investing. You'll become familiar with everything from key terms and the logic behind SRI to how SRI has evolved over time. With this information in hand, you'll be introduced to three essential SRI strategies—social screening, community investing, and shareholder activism—and discover how to determine what combination of these strategies best fits your social values. Each chapter is dedicated to a specific strategy and designed to give you a comprehensive understanding of how that strategy works and what it takes to successfully integrate it into your everyday investment activities. Along the way, you'll learn why these strategies are so effective and how to choose from a variety of funds that follow them. *Compelling Returns* contains insights that individual investors will find invaluable, but it also offers some practical advice for institutional investors—such as endowments and foundations—that may be interested in SRI solutions, and details why you should care about these types of strategies. The combination of both competitive investment performance and positive social impact through SRI strategies has in fact made for compelling returns. This well-rounded resource—which includes an information-packed appendix—will show you how socially responsible investing can help you make the money you desire while making a real difference.

From the Back Cover

Praise for *Compelling Returns*

"Scott Budde's *Compelling Returns: A Practical Guide to Socially Responsible Investing* covers all the bases for individual investors interested in fully integrating social factors into their personal investment strategies. As Mr. Budde points out, by understanding investment options, and carefully planning investments, socially responsible investors can achieve competitive investment returns. It is an essential guide for anyone who wants to employ the SRI approach to investing." —Denise L. Nappier, Connecticut State Treasurer

"*Compelling Returns* offers value-based investors the practical tools and information to make good choices that are in line with their values and achieve comparable rates of return. Scott Budde's thoughtful and transparent approach makes socially responsible investing accessible to anyone interested in 'doing well and doing good.'" —Jean Pogge, Executive Vice President of Consumer and Community Banking, ShoreBank

"*Compelling Returns* outlines a 'compelling case' for individuals and institutions alike to invest in a socially responsible manner. Grounded in the experiences of TIAA-CREF and the mandate of their clients, this book provides multitudes of current examples and digs deep into various objections to offer a thoughtful, detailed analysis of socially responsible investing." —Timothy Smith, Senior Vice President, Environment, Social Governance Group, Walden Asset Management

"*Compelling Returns* offers a clear, comprehensive introduction to socially responsible investment and a convincing refutation of common myths and misperceptions about SRI. At the same time, Budde provides a well-crafted, provocative argument for a particular SRI investment style that can achieve competitive returns, align investments with values, and effect social change. It's hard to survey the field of SRI and simultaneously take a clear stand within it—Budde does both very well." —David Wood, Director, Boston College Institute for Responsible Investment

"*Compelling Returns* marks a milestone in the mainstreaming of socially responsible investing. Drawing on the experience of a venerable institutional investor, the book provides a simple and practical guide to the increasingly complex choices for making investments that address social and environmental challenges while generating reasonable financial returns. *Compelling Returns* will resonate with those who already know they want to invest responsibly, but seek clear advice on how to do so." —Antony Bugg-Levine, Managing Director and head of Impact Investing, Rockefeller Foundation

"This is the most practical 'how-to' book that makes social investing accessible for anyone." —Jackie Khor, Managing Director, Imprint Capital Advisors

About the Author

Scott J. Budde, CFA, is a Managing Director at TIAA-CREF Asset Management, the investment management arm of TIAA-CREF, a national financial services organization with over \$400 billion under management, and the leading provider of retirement services in the academic, research, medical, and cultural fields. He manages TIAA-CREF's Global Social and Community Investing Department. Budde currently serves as the Vice Chairman of the newly formed International Association of Microfinance Investors and represents TIAA-CREF as a shareholder of ProCredit Holding—a leading microfinance institution headquartered in Frankfurt, Germany. He is a graduate of

Bowdoin College and the School of International and Public Affairs at Columbia University.