

# ALIGNING INVESTMENTS WITH VALUES

The 2016 U.S. Trust Insights on Wealth and Worth® Survey cites giving back as a shared priority among the wealthy. Beyond philanthropy, many investors — particularly women — are interested in investing in companies that align with their values and make a positive impact while also providing financial return potential.

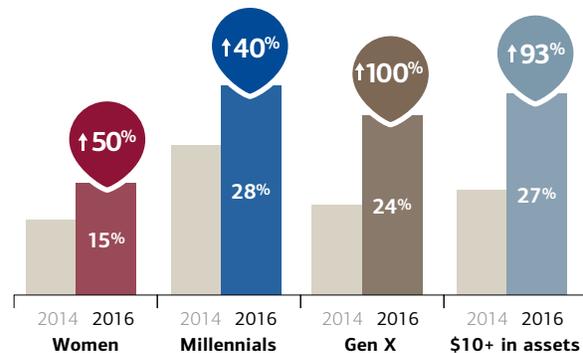
## DEFINING IMPACT INVESTING

Impact Investments, as defined by the Global Impact Investing Network, are those “made into companies, organizations, and funds with the intention to generate social and environmental impact alongside a financial return.”

While this concept isn’t new, the outspoken commitment by the newest generation of investors — and echoed by women across age groups — to create positive global impact through investment selection has brought this strategy into the spotlight.

As growth of 40% or more in Impact Investment ownership among women, younger and ultra-high-net-worth investors reveals, the wealthy are investing in the future, citing the social, political or environmental impact of investments as an important factor when choosing funds.

Impact Investment ownership is increasing

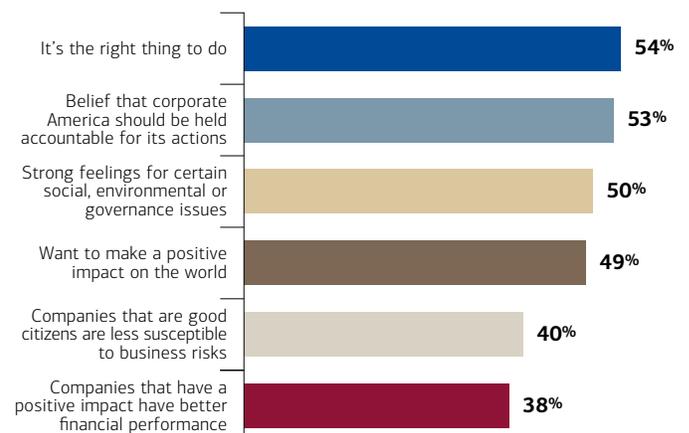


## MOTIVATORS FOR MAKING IMPACT INVESTMENTS

Of those who own or are interested in owning Impact Investments, more than half do so because it’s the right thing to do or because they feel it’s the responsibility of American corporations to act in a socially and environmentally responsible manner.

But interest in and use of this strategy is also driven by investment returns. Four in ten believe companies with good social and environmental practices are less susceptible to business risks, and nearly the same number believes these good corporate citizens deliver superior financial performance.

Top reasons for owning Impact Investments

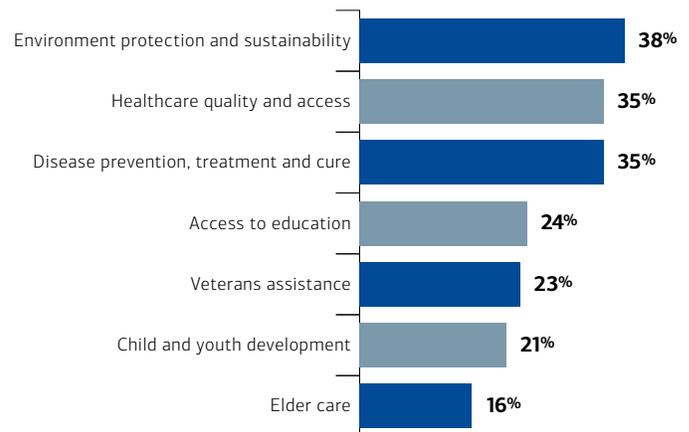


# DIVERSE AREAS FOR INVESTMENT

Areas of investment are as diverse as the individuals. Environmental protection and sustainability tops the list of issues that matter most to high-net-worth investors, followed closely by healthcare and disease prevention and treatment.

Also of high importance are access to education and support for vulnerable members of society — veterans, children and elders.

## Top Impact Investment interests



## LEARN MORE ABOUT ALIGNING INVESTMENTS WITH VALUES

The first step in aligning investments with beliefs is to pinpoint top motivations and interests. In preparation for a conversation with an advisor on how to approach an Impact Investment strategy, consider the following questions:

1. Where is my passion? Which global or local challenges motivate me?
2. How might global economic trends be affecting these challenges? What role can my investments play in contributing to solutions?
3. What are my investment objectives? Am I satisfied by financial returns or am I also driven to affect issues I am passionate about through investment?

Learn more at [ustrust.com/impactinvesting](http://ustrust.com/impactinvesting).

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### Study methodology

The 2016 U.S. Trust Insights on Wealth and Worth® survey is based on a nationwide survey of 684 high-net-worth and ultra-high-net-worth adults with at least \$3 million in investable assets, not including the value of their primary residence. Respondents were equally divided among those who have between \$3 million and \$5 million, \$5 million and \$10 million, and \$10 million or more in investable assets. The survey was conducted online by the independent research firm Phoenix Marketing International in January 2016. Asset information was self-reported by the respondent. Verification for respondent qualification occurred at the panel company, using algorithms in place to ensure consistency of information provided, and was confirmed with questions from the survey itself. All data have been tested for statistical significance at the 95% confidence level.

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