

RATHBONE  
GREENBANK  
INVESTMENTS



ETHICAL AND SUSTAINABLE  
INVESTMENT SERVICES



**RATHBONES**  
Established 1742



## RESPECTING VALUES, IDENTIFYING VALUE.

AS CONCERNS FOR ETHICAL AND SUSTAINABILITY ISSUES RISE, INCREASING NUMBERS OF PEOPLE ARE SEEKING TO REFLECT THEIR VALUES IN THEIR INVESTMENT CHOICES. AS A SECTOR, SOCIALLY RESPONSIBLE INVESTING HAS MOVED FROM NICHE TO MAINSTREAM, DRIVING CHANGE WITHIN THE ECONOMY, THE ENVIRONMENT AND SOCIETY.

Understanding social, ethical and environmental issues is integral to Rathbone Greenbank Investments' approach. Our goal is to ensure we meet our clients' investment aims without compromising their values – whether they have specific interests and concerns or simply want their investments to be more broadly socially responsible.

Rathbone Greenbank is a pioneer in this arena, launching one of the UK's first bespoke ethical portfolio services. Our work with private individuals, charities, pension funds and professional advisors is based on:

- Tailoring every portfolio to the individual client rather than offering a 'product'
- Fully integrating ethical priorities with financial aims and objectives
- Building long-term relationships with clients and their advisers.

## RIGOUR AND EXPERTISE WITHIN OUR INVESTMENT PROCESS

Our management of investment portfolios is informed by our in-depth expertise in socially responsible investing, backed by a robust investment process:

- **Asset allocation and diversification.**  
We consider the full range of asset classes available to us, including bonds, equities, property and private equity. We also aim for diversification across sectors and companies, subject to an individual's ethical requirements.
- **Selection of companies offering sustainable long-term potential.**  
Through our in-house ethical research team we give full consideration to the extent to which a company understands and manages the social and environmental threats and opportunities it faces. This additional perspective enables us to identify companies which are ideally suited to meeting the challenges of the future.
- **Wide ranging sources of ethical and financial research.**  
Our investment managers are supported by a wide range of external brokers, analysts and fund managers. As a result, we constantly monitor market developments and identify attractive investment ideas and opportunities. We are independently owned and take a 'whole of market' approach to selecting investments.

## WORKING WITH US

Our clients have many and varied investment needs and ethical priorities. Our portfolio options range from broad-based socially responsible portfolios to those applying strict ethical exclusions. In addition to these more bespoke options we are able to offer portfolios invested in ethically screened managed funds, where appropriate.

Rathbone Greenbank strives to bring about positive change through investment and, in addition to our more mainstream ethical investments, we are one of the UK's largest investors in social enterprise investments (including fair trade, microfinance, organic farming, social housing and sustainable transport).

We are committed to constructive dialogue with companies, and work individually and in partnership with other socially responsible investors and non-governmental organisations to encourage improvements in business practice.

We know that investments matter to our clients – helping them achieve their needs and aspirations. Together, we know that how we invest today, will shape the world of tomorrow.



# CONTACT US

RATHBONE GREENBANK INVESTMENTS PROVIDES PERSONALISED AND PROFESSIONAL INVESTMENT SERVICES FOR INVESTORS WHO WISH TO ENSURE THAT THEIR INVESTMENTS TAKE ACCOUNT OF THEIR ENVIRONMENTAL, SOCIAL AND ETHICAL CONCERNS.

FOR FURTHER INFORMATION ON THE SERVICES THAT WE PROVIDE, OR TO ARRANGE A MEETING, PLEASE CONTACT ONE OF OUR RATHBONE GREENBANK INVESTMENT DIRECTORS.

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Rathbones also has offices in:

Aberdeen | Birmingham | Cambridge | Chichester | Edinburgh | Exeter | Kendal | Liverpool | London | Winchester

The information comprised within this document was valid as of 27 September 2011. Rathbone Investment Management Limited is part of Rathbone Brothers Plc. Head office 159 New Bond Street, London W1S 2UD. Rathbone Greenbank Investments is a trading name of Rathbone Investment Management Limited. Rathbone Investment Management Limited is authorised and regulated by the Financial Services Authority. Registered office: Port of Liverpool Building, Pier Head, Liverpool L3 1NW. Registered in England No. 1448919

The value of your investments can go down as well as up, so you could get back less than you invested.



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