**Socially Aware Investing**

Use if client/prospects indicate they want to avoid holding stocks that have

dealings with any of the following:

|  |  |
| --- | --- |
|  | List the Maximum Percent You Feel comfortable Holding In Your Portfolio |
| Non-Marriage (Same-Sex) Lifestyle: |  |
| Nuclear Power: |  |
| Affirmative Action: |  |
| Military/Defense Contractors: |  |
| Environment: |  |
| Pornography: |  |
| Abortion: |  |
| Alcohol: |  |
| Tobacco: |  |
| Gaming (Gambling): |  |
| What is the maximum percentage of the portfolio allowed for all of the above six categories combined? |  |