



Impact investments are made with the intention to generate measurable social and environmental impact in addition to a financial return, and Beacon Pointe has extensive experience in this field.

A Positive Impact Through Values-based Investing



Socially Responsible Investing

(SRI) is defined by negative and/or positive screening and shareholder advocacy. SRI investors can deliberately seek funds that screen out investments such as tobacco, weapons, animal testing, fossil fuel industries, etc.



Sustainable Investing

Is characterized by investors seeking to invest in companies that demonstrate socially responsible behavior or practices. This operational impact is classified as Environmental, Social and Governance (ESG) practices.



Impact Investing

Incorporates SRI and ESG factors and is a directed approach used to address a particular goal of the client. Beacon Pointe works to express these values in client investment policy statements and portfolios.

A Socially Responsible Investment Approach

Beacon Pointe strives to minimize costs and maximize efficiencies while enabling clients to accomplish their values-based investing goals. This is done by paying careful attention to the process of establishing the portfolio structure and recognizing the paramount importance of social guidelines and restrictions.

We assist clients with determining what matters most to them and then develop a personal Impact Investment Policy Statement that reflects these passions. The advisory team then creates a customized portfolio for each client, choosing specific mission-related equity, fixed income and alternative strategies from Beacon Pointe's extensive impact investing options. Clients have access to a full range of vehicles, including Separately Managed Accounts, Private Placements, Mutual Funds and ETFs.

How Beacon Pointe Evaluates Strategies

In addition to meeting Beacon Pointe's strict quantitative and qualitative evaluation criteria, responsible and impact investment manager candidates are asked to complete additional due diligence, including an in-depth review of:

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Overall philosophy and approach to responsible and impact investing
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Firm-wide resources dedicated to the responsible investing effort and related strategies
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Relative importance of exclusionary and inclusionary screens during the idea generation process
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Values-based considerations in portfolio construction, buy and sell disciplines, and risk guidelines
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Ability to customize client portfolios to meet specific social objectives and restrictions
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Approach to shareholder activism and proxy voting, level of industry and community involvement
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Thought leadership in the area of responsible investing; published research on related topics

Beacon Pointe will work diligently to create a strategy that is consistent with values-based client objectives. When implementing and monitoring this strategy, our advisory team and Investment Research Department will constantly search for new ways to express client values.