

NEW HARBOR PORTFOLIOS

Purpose Driven, Socially Conscious Investing

Why New Harbor Impact Portfolios?

Creating better outcomes for investors isn't just financial, it also means taking care of our communities and the planet. As fiduciaries, deMAURIAC keeps your best interest at the center of our business. We put your needs first to help you achieve your financial goals through diversified investments. That's why we systematically integrate environmental, social and governance information across a range of equity and income investment strategies in our New Harbor Impact Portfolios.

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Building Sustainable Portfolios:

What We Avoid

Exploitative Products, Practices & Services

We avoid investment in products such as firearms, predatory lending, tobacco, companies that produce landmines or other controversial weapons. We also review our portfolios for investment exposure to private prisons themselves, as well as for exposure to companies that have predatory practices within the private prison “ecosystem” through goods and services like transport, logistics, etc.

Negative Environmental Impact

Air and water pollution disproportionately affect Black, Latinx, and Indigenous communities, and exposure to it is linked to higher mortality rates, especially in areas like Cancer Alley in Louisiana. We avoid investing in companies that generate toxic air and water pollution and those that have wasteful practices that are detrimental to the environment.

Fossil Fuels

We aim to track companies that do not own fossil fuel reserves.

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What We Invest In:

Racial Justice & Workplace Diversity

We look for companies that engage with their workforce to ensure safe working conditions. We also seek out companies that are actively working toward diversity and inclusion in the workplace through equalizing pay gaps and through employment initiatives to improve recruitment and retention of diverse employees, as well as representation in board rooms and in executive leadership. We are also working with fund managers and asking them to integrate a more diligent lens into their investment processes to include gender, race and environmental considerations.

Women's Equity/Gender Parity

Our portfolios seek to provide exposure to companies that demonstrate greater gender diversity within senior leadership. We focus on companies with the highest levels within their sectors of senior leadership gender diversity.

Sustainable & Renewable Energy

When you invest in New Harbor Impact Portfolios, you are helping to fund infrastructure projects with direct environmental benefits through exposure to investment grade global green bonds, where the use of proceeds are directly tied to promote climate or other sustainability causes through independent evaluation. We invest in funds that pursue a measurable environmental impact: some of the funds we invest in specifically select companies based on carbon footprint using a 5-level screening process to put emphasis on firms that are not only socially responsible and meet ESG guidelines, but also have strong operational efficiency against less sustainable peers.

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What is ESG Integration? Why Does It Matter?

ESG integration is about using research and insights about company environmental, social and governance in addition to financial factors to inform investment decisions. This ensures that the decisions we make on what to invest in are data driven.

1. Environment:

Covers themes such as climate risks, natural resources scarcity, pollution and waste, and environmental opportunities

2. Social:

Includes labor issues and product liability, risks such as data security, and stakeholder opposition

3. Governance:

Encompasses items relating to corporate governance and behavior such as board quality and effectiveness

We prefer to invest in companies with better or improving ESG profiles relative to sector peers, investing with the intent to generate measurable positive social and environmental benefits. All of our New Harbor Impact Portfolios include funds that include ESG integration. This is where we set the bar, but we are always looking at new ways in which we can create more meaningful impact in meeting the needs of our clients.

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What Will You Do Next?

Find out if your current investments are in line with our criteria for social justice and environmental sustainability by sending us statements and we will analyze your holdings for you. If you're interested, we'll work with you to make a transition plan that balances your financial goals, tax considerations, and the social impact you want to make.

After you've moved to a New Harbor Impact portfolio, we monitor your investments so that if an investment falls out of alignment with our social, environmental and corporate governance criteria, your portfolio will be adjusted.

Email Marigny@deMauriac.com with questions or schedule a consultation.