

Socially Responsible Investing
“Making a Difference with Ideals, Impact, and Involvement”
FREE Teleconference Workshops
Spring 2008 Schedule

For Whom: Social Justice Committees, Finance & Endowment Committees, Treasurers, investing clubs and individual UUs interested in using money as a tool for social justice.

What: The UUA Committee on Socially Responsible Investing is proud to continue its free learning sessions introduced in the Winter of 2006.

How: Gather around the speakerphone for one or all three sessions. Download each PowerPoint presentation from the “Print Files” website below or request a copy to be emailed to you beforehand. Each session includes a 45-minute presentation followed by 15 minutes of questions and answers. Register at least three days before the session by emailing Rachel Daugherty at rdaugherty@uua.org with your name, phone number, congregation or other affiliation, and your role/title. To participate:

Print Files: <http://www.uua.org/leaders/leaderslibrary/responsibleinvesting/60329.shtml>

Call USA Toll-Free Access #: (866) 868-1054

Enter Conference Code: 1571617

When: Each session is held on a Saturday morning for one hour from 1:00pm EST to 2:00 EST. Start times in other regions: 12pm Central Time, 11am Mountain, and 10am Pacific.

Impact – Community Investing

Saturday, April 12th, 1:00pm EST

You’ve heard about the fringe banking community – payday lenders, check-cashing centers, etc. There’s another sector of financial institutions serving low-income communities by creating wealth rather than stripping it -- community development financial institutions (CDFIs). CDFIs include banks, credit unions, and loan funds. Your congregation can invest in these and thereby support fairly priced capital access that creates jobs, finances affordable housing, and fosters microenterprise development. Join this call to learn what you can do and how the UUA can match your investment.

Ideals – Investment Screening

Saturday, April 19th, 1:00pm EST

What we choose to buy and where we choose to invest loudly proclaims our ideals. This seminar will help us set standards and wend our way through the grey areas. A special focus will be HOW TO discern the choices in mutual fund investing.

Involvement – Shareholder Activism

Saturday, April 26th, 1:00pm EST

Shareholder activism has caused major corporations to change their behavior. For instance, as a result of a carefully orchestrated dialogue with management and finally the CEO of Home Depot, that company changed its policy to include sexual orientation as one of the prohibited discriminations. See story at www.uua.org/leaders/leaderslibrary/responsibleinvesting/shareholderadvocacy/56198.shtml, or go to uua.org and type in “shareholder activism.” Join this call to learn how you can take part in this vital movement and demonstrate that our faith can make mountains move.