

Socially Responsible Investing Policy Westside UU Church's Endowment Fund

UNITARIAN UNIVERSALIST PRINCIPLES

- 1) The inherent worth and dignity of every person
- 2) Justice, equality and compassion in human relations
- 3) Acceptance of one another and encouragement to spiritual growth in our congregations
- 4) A free and responsible search for truth and meaning
- 5) The right of conscience and the use of the democratic process within our congregations and society at large
- 6) The goal of world community with peace, liberty, and justice for all
- 7) Respect for the interdependent web of all existence of which we are a part

PHILOSOPHY & OBJECTIVES

As Unitarian Universalists we believe in the Seven Principles listed above. In putting our faith into action we will follow an investment policy that will avoid individual investments in companies or sectors based on Socially and Environmentally Responsible Investing as defined by the SIC codes listed below. However to achieve a well diversified, low cost, passively managed fund, the majority of our funds will be invested in broad based indices, in accordance to the Endowment Investment and Distribution Policy approved by the Congregation.

AVOIDED SECTORS

The Endowment Committee will avoid making individual stock and bond purchases in companies that have the following SIC codes:

- 1311 Crude Petroleum and Natural Gas
- 2911 Petroleum Refining
- 1220 Bituminous Coal and Lignite Mining
- 0132 Tobacco