MISSION WEALTH®

Your goals. Our mission.

Social Values Portfolio

How do we know that a company is 'GOOD'?

We use third-party research to analyze thousands of companies worldwide. Companies receive an Intangible Value Assessment (IVA) score based upon key environmental, social, and corporate governance issues.

The companies are compared and rated against each other; a final letter rating is then given using a scale that ranges from best (AAA) to worst (CCC).

Your money can make a difference.

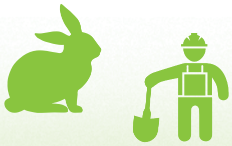
Socially Responsible Investing (SRI) is a well-established and growing approach that considers societal good and financial return. Globally, at least $21 trillion is professionally managed under an SRI mandate.[1]

Many of us want our investments to contribute to advancements in **environmental**, **social**, and **corporate governance** (ESG) practices, but don't know where to begin.

Mission Wealth's Social Values Portfolio was created to make SRI easy. It includes an array of U.S. and international stocks in a diversified portfolio.

We select and proactively monitor companies deemed to be "best in class" based on ESG criteria.

What are we investing in?



We invest in companies that promote socially responsible values.

We **avoid** investing in companies that have controversial products and/or records.

We invest in companies that have outstanding ESG practices within their respective industries.

Typically, these are companies that are leading the charge in addressing the challenges of our time, such as climate change, water management, food scarcity, pollution, corporate ethics, labor conditions, and human rights, among others.

Additionally, if there are specific values especially important to you, we can further customize and tailor the portfolio to align with your preferences.

Can an SRI portfolio make competitive returns?

Our research found that many companies with high ESG ratings also tend to have strong stock performance, allowing for return potential. Mission Wealth's Social Values Portfolio enables you to be part of this exciting trend.

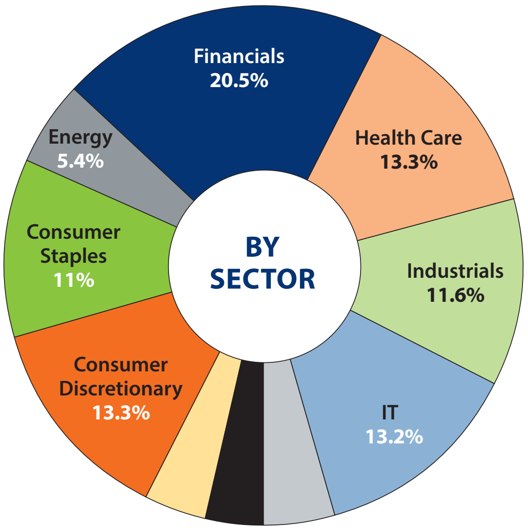
Social Values Portfolio

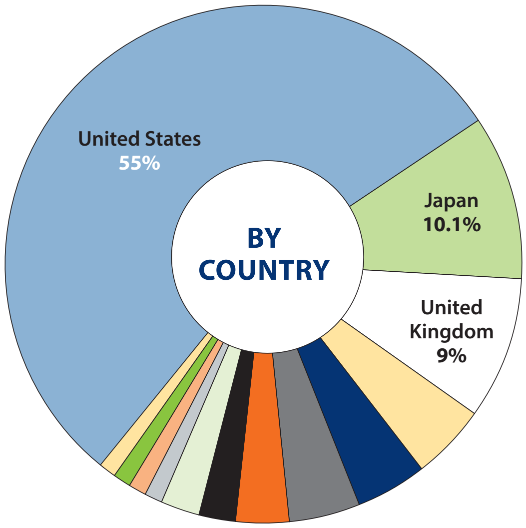
At Mission Wealth, we believe a broadly diversified portfolio can reduce risk. Our Social Values Portfolio includes over 100 domestic and international stocks. Unlike a mutual fund or ETF, you hold these securities directly; therefore, you know exactly what you own.

Examples of Companies with IVA Scores of AAA

COMPANY	COUNTRY	SECTOR	INDUSTRY
Agilent Technologies	U.S.	Health Care	Laboratory Solutions
AXA	France	Financials	Insurance
BT Group	Britain	Telecom	Telecommunications
Cardinal Health	U.S.	Health Care	Pharmaceuticals and Medical Products
Cummins	U.S.	Industrials	Engines and Power Generation Products
Ecolab	U.S.	Materials	Water, Hygiene and Energy Technologies
Iberdrola	Spain	Utilities	Electric Utilities
L'Oreal	France	Consumer Staples	Cosmetics
SAP SE	Germany	Information Technology	Business Software
Teradata	U.S.	Information Technology	Enterprise Big Data Analytics
Tesla Motors	U.S.	Consumer Discretionary	Automotive and Energy Storage
Tiffany & Co.	U.S.	Consumer Discretionary	Jewelry

Portfolio Allocation





We invite you to join us for a private conversation to see how we can help you make your money more meaningful.

(888) 642-7221

Santa Barbara • Westlake Village • Los Angeles
San Francisco • Denver • Scottsdale

[1] Global Sustainable Investment Alliance (GSIA). (2015). *Global Sustainable Investment Review 2014.*