



Financial Planning to Build Wealth, Manage Risk and Build a Better World PEOI3005

What does the changing world have to do with your investments? More than you think. Learn how changing social and environmental landscapes- from China to BP- can affect your retirement and how to plan around it. By looking at your portfolio through a socially responsible or "values based" lens, you can learn how to manage financial risk and drive change. This course will give you the knowledge and tools to ask the right questions to ensure you are investing in a way that matches your values while taking care of your investments.

Topics:

- History, an overview of ethical/socially responsible/sustainable/ESG investing
- Who else is doing it?
- How are global events affecting Canadian markets?
- Words and terminology – the language
- Developing your investment value criteria and the screening process
- Shareholder engagement- you have a vote
- Returns-how much do I need?
- Choosing your investments and monitoring progress
- Choosing a financial coach

Learning Outcomes:

- Understand the principles of socially responsible investing
- Understand the links between global events and stock markets
- Knowledge of the vernacular behind socially responsible investing
- Understand the various tools that exist to lower risk in your portfolio

Facilitator: Stephen Whipp believes passionately that people working together for the common good CAN change the world. Originally trained as a journalist, Stephen spent 20 years actively dedicated to environmental, justice, community and aboriginal issues. These experiences, along with his personal integrity and progressive values, shape his practice of values-based financial planning and ethical investing. A Senior Financial Advisor with Manulife Securities Incorporated on Victoria's Westshore, Steve is a frequent speaker on ethical investing throughout BC and beyond. He is active with the Canadian Social Investment Organization and Westshore Chamber of Commerce.

Length: 2 hours

Date: Sat, Feb 23, 2013

Time: 10am - 12pm

Cost: \$55 + applicable taxes

Best to Register by: Sat, Feb 9, 2013

To Register:

Register online at <http://cstudies.royalroads.ca/> using a major credit card; or by telephone, Monday to Friday, 8:30 a.m. – 4:30 p.m. at **250-391-2600, ext. 4801**; or **Toll Free at 1-866-890-0220**. Or, come by in person to the Continuing Studies office at Grant 117, 2005 Sooke Road, Victoria, BC, Canada V9B 5Y2.