

Socially responsible investing

What it means within Mennonite Retirement Trust

Your employer offers Mennonite Retirement Trust (MRT) to help you save for your retirement. As an additional benefit, MRT offers you the ability to invest in line with your values – with socially responsible investments (SRI).

What is SRI?

Socially responsible investing, also known as environmental, social and governance (ESG) investing, is an approach that considers both financial return and the societal good that results from an investment.

Socially responsible investments encourage corporate practices that promote such values as consumer protection, human rights, environmental stewardship and diversity. Some avoid investing in companies involved in alcohol, tobacco, gambling, pornography, weapons or abortion products.

While no investment can perfectly align with one's personal vision for the world, SRI/ESG investments promote a positive vision in ways that most other investments do not.

Which MRT funds are SRI?

Among MRT's list of investment choices, you will see "SRI" by the name of the investment if it pursues SRI or ESG goals, such as:

ABC Investment Fund SRI

Find the [current list of investment options](#) at everence.com/MRT (in the Employee/plan participant section under Resources).

Get advice

For answers to your questions, advice and help in selecting SRI/ESG investments that align with your values and meet your long-term financial goals, please consult your Everence advisor, who has experience working with SRI/ESG funds. If you do not have an advisor, visit www.everence.com/findadvisor.

This overview of SRI is not investment advice. Your Everence advisor is in the best position to help you with your investment choices to meet your personal goals and needs.