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A Smarter Way to Invest

Research demonstrates that sustainable and impact wealth management strategies can perform as well or better than others. Sustainable and impact strategies may enable investors to address both market performance and social and environmental gain.

CREATE IMPACT (CREATING-IMPACT /)

Why Veris?

We offer a unique approach to wealth management. We enable you to achieve both your financial goals *and* your impact investing objectives.

 We offer objective and unbiased wealth management that balances risk and reward

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according to *your* specific objectives.

- 🌐 Our clients benefit from our unmatched experience and network of investment solutions.
- 🌐 Our gender diverse team has a special emphasis on serving and empowering women investors.
- 🌐 Our commitment to authentic relationships and outstanding service is the reason our clients continue to refer friends and colleagues to us.
- 🌐 We are an independent, partner-owned firm.

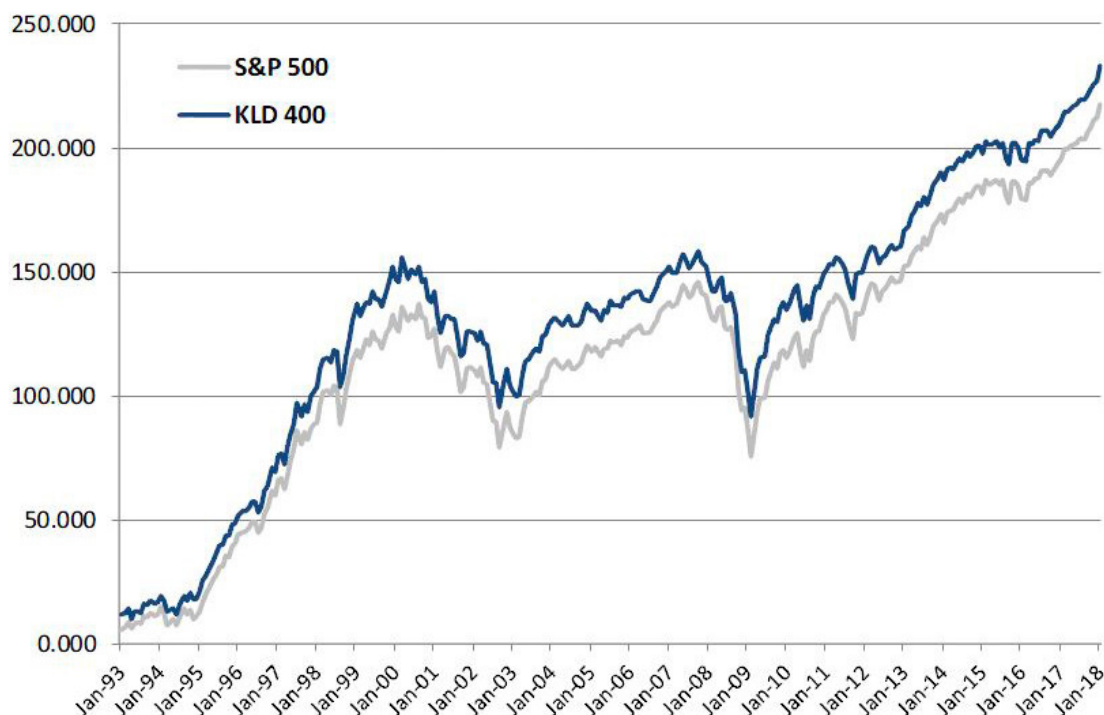
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Impact and sustainable investing can deliver social benefit *and* financial gain.

Companies that operate with sustainable business practices often have a competitive advantage in the marketplace that may translate into strong financial performance for investors.

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This chart compares the MSCI KLD 400 Social Index, which provides exposure to companies with favorable environmental, social and governance (ESG) ratings*, to the S&P 500 Index, an index of large-cap U.S. equities that doesn't take into account ESG criteria. The annualized 20-year return through 1/31/2018 of the MSCI KLD 400 Social was 5.46%, compared to the 5.43% return of the S&P 500.

*The MSCI KLD 400 Social Index is a capitalization weighted index of 400 US securities that provides exposure to companies with outstanding Environmental, Social and Governance (ESG) ratings and excludes companies whose products have negative social or environmental impacts. Constituent selection is based on data from MSCI ESG Research.

Featured Webinar

November 2018: *Veris Wealth Partners*

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2017 Impact Report: A Breakthrough Year

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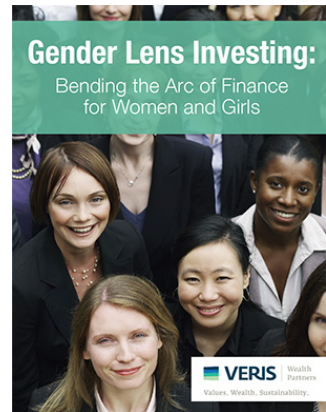
Veris is proud to announce the release of its 3rd annual Impact Report, highlighting the collective achievements of its clients, the Veris team, and the investment managers we worked with in 2017.

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October 2018: *Veris Wealth Partners*

Gender Lens Investing: Bending the Arc of Finance for Women & Girls (<https://www.veriswp.com/research/gli-bending-arc-of-finance-women/>)

Interest in Gender Lens Investing continues to grow significantly. In its latest report on Gender Lens Investing, Veris Wealth Partners examines the key developments of the past 12 months and highlights the investment providers who are meeting the growing investor demand.



DOWNLOAD REPORT
([HTTPS://WWW.VERISWP.COM/RESEARCH/GLI-BENDING-ARC-OF-FINANCE-WOMEN/](https://www.veriswp.com/research/gli-bending-arc-of-finance-women/))

Let's Work Together

Veris works with individuals, families, and private foundations to align your wealth with your worldview. We're a pioneering firm that can manage your wealth today and across generations.

Latest Insight



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Don't Fall Behind – Water Is A Great Opportunity For Investors (<https://www.veriswp.com/dont-fall-behind-water-is-a-great-opportunity-for-investors/>)

Veris Guest Blog: By David Richardson, CFA

The theme of the UN's annual World Water Day last month was "leave no-one behind." This sentiment is applicable to both emerging markets and the

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[\(https://www.veriswp.com/ellen-remmer-an-inspiring-journey-about-impact-investing-and-empowering-women/\)](https://www.veriswp.com/ellen-remmer-an-inspiring-journey-about-impact-investing-and-empowering-women/)

Ellen Remmer: An Inspiring Journey About Impact Investing and Empowering Women (<https://www.veriswp.com/ellen-remmer-an-inspiring-journey-about-impact-investing-and-empowering-women/>)

By Anders Ferguson, Partner

Ellen Remmer's journey from enlightened philanthropist to impact investor is a story that can inspire all of us.



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Collective Consciousness and the Refugee Crisis (<https://www.veriswp.com/collective-consciousness-and-the-refugee-crisis/>)

By Alison Pyott, Partner and Senior Wealth Manager

Many of us are struggling with the current global refugee crisis and seeking some small way to make a difference. Ban Ki-Moon wrote an op-ed for The New York Times titled, "The refugee crisis is a test of our collective conscience."

developed world, while offering opportunities for investors in water.

Recently, I sat down with Ellen to discuss her life’s journey. I wanted to share her experience because it speaks to the potential of investing capital to achieve both social benefit and financial gain. It’s also instructive in describing how investors can change their mind about the role and possibilities of wealth.

The situation is overwhelming and absolutely a test of our collective conscience. As global citizens, we can use our awareness, energy and philanthropy to help. The impact investor has additional options.

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