

How the Tri-State CRI Can Support Your Commitment to SRI

■ Join Tri-State CRI as an Institutional Investor

Members of the Tri-State CRI are part of an active and vibrant community where they gain access to information and opportunities to support and re-source their SRI commitments. Member benefits include an invitation to attend our meetings; our monthly electronic newsletter; access to ICCR resources and network; opportunities to participate in corporate engagement; connection to mentorship and development opportunities; insights into trends in SRI; improved financial literacy; and support for your Investment Committees and Offices.

■ Proxy Voting Service

Our **proxy voting** service fulfills the complex and sometimes burdensome responsibility of an investor. Our proxy voting supports governance decisions and shareholder proposals that further the financial, environmental, and social aims of corporate social responsibility and ensures alignment with the engagement work.

■ Engagement Services

Members or other investors may engage the Tri-State CRI to facilitate your shareholder advocacy. **We conduct corporate engagement on behalf of investors** in priority areas of concern, meeting with companies and filing shareholder resolutions as appropriate.

■ Join our Partners Program

Individual Investors can join our Partners Program to stay informed of our work, learn about opportunities to get involved, and support Catholic Social Teaching in practice.

■ Support Our Work

The Tri-State CRI is a 501(c)(3) tax exempt non-profit organization and **support from generous donors** enables us to continue expanding and deepening our work to provide resources to our members.

Members

Carmelite Friars
Congregation of Holy Cross, Moreau Province
Congregation of Notre Dame,
Blessed Sacrament Province
Congregation of the Passion
Daughters of Wisdom
Dominican Friars
Dominican Sisters of Hope
Dominican Sisters of Sparkill
Franciscan Missionaries of Mary
Franciscan Sisters of Allegany, NY
Franciscan Sisters of the Atonement
Franciscan Sisters of the Poor
Maryknoll Fathers & Brothers
Maryknoll Sisters of St. Dominic
Mercy Investment Services, Inc.
Province of St. Mary of the Capuchin Order
Religious of the Sacred Heart of Mary
RENEW International
Roman Catholic Diocese of Albany, NY
School Sisters of Notre Dame, AM Province
SCL Health
Sisters of Charity of Halifax
Sisters of Charity of Leavenworth, KS
Sisters of Charity of New York
Sisters of Notre Dame de Namur
Sisters of Our Lady of Christian Doctrine
Sisters of Saint Dominic of Amityville
Sisters of Saint Dominic of Blauvelt
Sisters of Saint Dominic of Caldwell
Sisters of Saint Joseph of Carondelet
Sisters of Saint Joseph of Peace
Sisters of Saint Joseph of Brentwood
Sisters of the Good Shepherd
Sisters of the Presentation of the
Blessed Virgin Mary
Society of Jesus, USA Northeast Province
Society of St. Ursula
Society of the Holy Child Jesus
St. Philip the Apostle Foundation
Ursuline Sisters of Tildonk, U.S. Province
Ursuline Sisters of the Roman Union,
Eastern Province

“It is important that ethics once again play its due part in the world of finance and that markets serve the interests of peoples and the common good of humanity.”

Pope Francis

Symposium on Investing for the Poor 2014

Tri-State
Coalition
for
Responsible
Investment



WHO WE ARE AND WHAT WE DO



Founded in 1975, the Tri-State Coalition for Responsible Investment (Tri-State CRI)

is a membership organization composed of Roman Catholic religious orders, dioceses and institutions primarily in the New York Tri-State area. Believing that investors' fiduciary duty goes beyond achieving financial results, our members strive to align the mission of their investments

with Catholic Social Teaching to create a more just and sustainable world. Through collaboration with the Interfaith Center on Corporate Responsibility, a coalition of 300 institutional investors, Tri-State CRI members are empowered to use their voice as shareholders to engage corporations on social, environmental and governance issues and promote corporate social responsibility.

"Profit is useful if it serves as a means towards an end that provides a sense both of how to produce it and how to make good use of it. Once profit becomes the exclusive goal, if it is produced by improper means and without the common good as its ultimate end, it risks destroying wealth and creating poverty."

Pope Benedict XVI
Caritas in Veritate, 2009

What is Socially Responsible Investing (SRI)?

SRI presents an opportunity to combine investors' financial obligations with their commitment to social, environmental, and governance concerns as well as to influence the way our economy operates. SRI in practice includes:

- Investment policies that reflect one's mission and values;
- Dialogue with corporate leadership about issues of concern;
- Filing shareholder resolutions;
- Voting proxies; and
- Impact Investing to generate social, environmental, and financial returns that support areas such as affordable housing, healthy food access, community development, and renewable energy and other climate solutions.

Contact our office to learn more: Tri-State Coalition for Responsible Investment

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"The global economy has moral dimensions and human consequences. Decisions on investment ... should protect human life and promote human rights, especially for those most in need."

US Conference of Catholic Bishops (USCCB), *Catholic Framework for Economic Life*, 1997

The Concerns We Address with Corporations Today

Given the central role of corporations today, engagement with executives enables us to have broad impact. Inspired by principles of Catholic Social Teaching such as working for the Common Good, respect for Human Dignity, Care of God's Creation, and the Preferential Option for the Poor, we address the following concerns with companies:

- Global Climate Change
- Human Trafficking
- Excessive Speculation in Food Commodities
- Water Stewardship and the Human Right to Water
- Sustainable Agriculture
- Human Rights in the Global Supply Chain and Extractive Industry
- Access to Medicines/Health
- Justice in the Financial Sector
- Corporate Governance and Executive Compensation
- Transparency in Corporate Lobbying and Political Spending

"What do we place at the center of our economy? What do we need to do to have a sustainable future on our planet for our children and grandchildren? The Tri-State CRI provides a forum to come together as we struggle with these questions at the heart of our spiritual task."

Catherine Rowan
Maryknoll Sisters