

REFERENCE SHELF

SOCIAL INVESTING RESOURCES

Investors wishing to incorporate concern for social issues into their investment decisions have several outlets for information; this listing provides a starting point.

The first section lists organizations

and advisory letters that focus on social issues as they pertain to companies and investors.

The second section lists the Web sites of these groups and the information you can find there. Check these for

links to socially conscious mutual funds and money managers.

My thanks to AAIL member Marcia J. Sill for her leads in updating this list.

—Jean Henrich

ASSOCIATIONS AND ADVISORY LETTERS

Clean Yield: P.O. Box 117, Greensboro, Vt. 05841, (802) 533-7178. Bimonthly newsletter by investment adviser that focuses on stocks passing social responsibility screens. Single issue \$3; \$80/year.

Consumer Reports, May 1997 issue: 101 Truman Ave., Yonkers, N.Y. 10703. Article listing mutual funds with most consistent social responsibility as rated by Morningstar. \$5

Co-op America: 1612 K Street N.W., Suite 600, Washington, D.C. 20006, (202) 872-5307. Non-profit organization to help businesses and individuals address social and environmental problems. Co-op America Quarterly included in \$25/yr. membership. Also publishes National Green Pages, an annual directory of socially and environmentally responsible businesses, \$6.95; and Financial Planning Handbook for Responsible Investors, free.

Council on Economic Priorities: 30 Irving Place, 9th Floor, New York, N.Y. 10003, (212) 420-1133. Conducts research on issues of corporate social responsibility, national security and economic and environmental concern. Rates all S&P 500 companies in 11 social categories. Publishes CEP Research Report monthly. Annual membership fee, \$35.

Franklin Research & Development: 711 Atlantic Avenue, 4th Floor, Boston, Mass. 02111, (617) 423-6655. Investment advisory service; rates companies on financial and social criteria.

Investing for a Better World newsletter published monthly, \$29.95.

The GreenMoney Journal: 608 W. Glass Ave., Spokane, Wash. 99205, (800) 318-5725. Independent group specializing in responsible business and investing information. 24-page Journal published quarterly; \$35/year.

Investor Responsibility Research Center: 1350 Connecticut Ave., N.W., Suite 700, Washington, D.C. 20036-1701, (202) 833-0700. Provides information on issues raised at corporate annual meetings through shareholder resolutions and produces studies on social topics as they relate to corporate activity. Publishes News for Investors monthly; \$275/year.

Kinder, Lydenberg, Domini & Co., Inc.: 129 Mount Auburn St., Cambridge, Mass. 02138, (617) 547-7479. Research and consulting firm for institutional investors and money managers involved in socially responsible investing. Developed a 400-company index to use as a benchmark for evaluating companies on a range of social screens, the Domini Social Index (released monthly).

Social Investment Forum: (303) 575-1597. Non-profit membership organization promoting socially responsible investing among institutions. Offers Mutual Fund Performance Chart free to the general public via fax-back service or Internet (see below).

WEB SITES

www.coopamerica.org: Lists of socially conscious mutual funds and educational information on socially responsible financial planning.

www.accesspt.com/cep.com: Searchable database of companies rated on socially responsible issues.

www.greenmoney.org: Includes information on social responsibility for investors and businesses.

www.goodmoney.com: Information on socially responsible investing as well as a list of mutual funds that invest responsibly and directory of social investment financial professionals.

www.socialinvest.org: Mutual Fund Performance Chart provides historical performance returns on socially conscious mutual funds. News and study results on socially responsible investing.