



# Smart Happy Money



**Ben Graham-Nellor**

Principal Adviser

Smart Happy Money Pty Ltd

## Future of Responsible Investing

*You may have heard about responsible investing, but what is it? Responsible investing takes into account the impact investments have on the planet and those who live on it. This means that responsible investments don't invest in things like gambling, tobacco, environmental damage, weaponry, slave or child labour. Responsible investment seeks out companies who meet the 'usual' investment requirements but also do not involve themselves in activities that you might like to avoid.*

*Did you know that if you haven't gone out of your way to avoid this in your investments or superannuation, chances are your money will be invested in companies that are involved in these activities? Responsible investing is a fast-growing area of finance in Australia and around the world. In our education session we are going to look at responsible investing, hear from a fund manager who runs a responsible investment fund, and then, I will take you through some ways you can apply this strategy to your situation.*

*We hope you can join us to learn about what responsible investing can mean to you.*

## Investing Responsibly

**Date:** Wednesday 26<sup>th</sup> May

**Time:** 6:30pm

**Venue:** 1/43 Power Road  
Bayswater Vic 3153

Please arrive 15 minutes early to ensure everyone is seated and ready on time.

**RSVP by:** 5pm on **Friday 14<sup>th</sup> May**

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**Or register online at link below**

W: [www.smarthappymoney.com/events](http://www.smarthappymoney.com/events)

Places are limited, book your free ticket today.

## Presentation Agenda

### Introduction to Smart Happy Money by Ben Graham-Nellor

#### Presentation on ESG investing by Nathan Lui (BetaShares)

- Why it is important to consider this type of investment
- How does this personally impact you
- What about returns and ease of access
- Key features
- What is the Future of ESG investing?
- Advantages and Disadvantages of ESG investing.

### Tea Break

#### Applying ESG philosophy to your investment strategy by Ben Graham-Nellor

- How responsible investing will impact you?
- What you need to consider?
- Next Step
- How we can assist you?
- Overview of Smart Happy Money and its philosophy?
- Complimentary meeting?

### Conclusion and Wrap up



**BetaShares**  
Exchange Traded Funds

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