

Environmentally Responsible Portfolio (ERP)

Positive Impact.

The portfolio seeks to make a positive impact on the world by investing in companies that focus on clean environment while striving to achieve long-term results.

Competitive Returns.

Research has shown that investing in disruptive companies with a focus on the environment can potentially increase returns while providing a better future for everyone.

Diversified Portfolio.

A diversified portfolio of exchange-traded funds focusing on the environment. The portfolio is monitored by our investment committee as they always look for additional opportunities to make a positive impact on the environment.

Your Investment Impact

The Environmentally Responsible Portfolio invests in global companies that are making a positive impact in our world while maintaining a diversified approach. Your impact includes:



Water



Clean Energy



Efficient Energy



Solar



Agriculture

List of Funds:

Fund	Symbol	Description
iShares Global Green Bond	BGRN	Exposure to investment grade global green bonds where the use of the proceeds are directly tied to promote climate or other environmental sustainability purposes through independent evaluation.
Etho Climate Leadership	ETHO	Identifies the most carbon efficient climate leaders in each industry. Additionally, a screen is conducted based on environmental, social and governance performance data.
Hartford Climate Opportunities Y	HEOYX	The fund is designed to seek opportunities that address climate change, including clean energy, sustainable transportation and water/resource management.
First Trust Clean Edge Green Energy	QCLN	The fund includes companies engaged in manufacturing, development, distribution and installation of emerging clean energy technologies including, but not limited to, photovoltaics, biofuels and advanced batteries.
iShares Global Clean Energy	ICLN	Exposure to companies that produce energy from solar, wind and other renewable sources giving targeted access to clean energy stocks from around the world.

Important Information and Disclosures

Advisory services offered through Berger Financial Group, Inc., a Registered Investment Advisor.

There is no guarantee that this strategy will achieve its investment goal. An investment in the strategy is subject to risk, including the possible loss of the principal amount invested. The strategy is subject to the risk of a decline in the value of its underlying stocks. Other risks include those associated with asset class, concentration, currency, financial sector, leveraging, liquidity, management, market, market trading and non-diversification risk.

Stop loss orders do not offer any guarantees against loss of investment. In most cases, the stock will be sold at a price that is close to the market price at the time the stop order is triggered. However, a stop order becomes a market order, so in some cases, the execution price could be significantly lower than the stop price.

The model advertised herein is not designed based on the individual needs of any one specific client or investor. In other words, it is not a customized strategy designed on the specific financial circumstances of the client.

This strategy may not be suitable for all investors. A full list of current holdings will be provided upon request.